

VERSION 8-05-04

# OMNISHIP

User Guide for Plantrol's Shipping System



100 BOURNE STREET  
WESTFIELD, NY 14787

## **DOCUMENT INFORMATION**

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This document is applicable to standard Plantrol systems and may not reflect customizations for your company's system. Documents are also written for the latest revision of a Plantrol System and include instructions on the latest standard and optional components.

This manual is designed to allow you to get started quickly, and to be a reference point for questions that may arise later. As each Plantrol product is somewhat customized to the user's needs, and functionality is steadily being added, it will not be all-inclusive.

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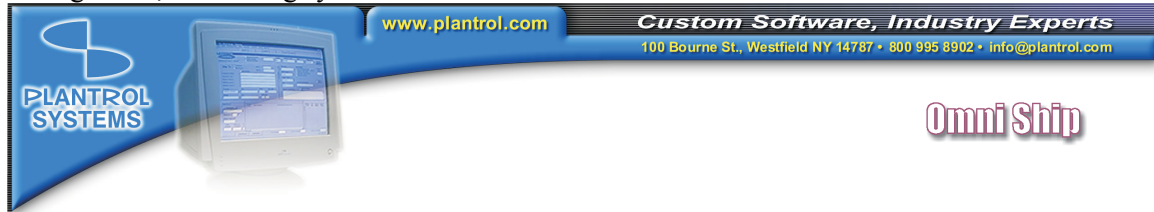
## **NOTES**

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# OVERVIEW

Plantrol's Omni Ship will allow you to process shipments efficiently, access carrier rates and services, print the shipping documents you need, and interface with your order entry, forms management, and billing systems. An overview of features is shown below.



Plantrol's Omni Ship processes and tracks any shipment efficiently, accesses carrier rates and services, prints the shipping documents you need and interfaces with your Order Entry, Finished Goods, and Billing systems. With an Interactive Website, your customers can visit your website and check the status of their shipment any time of day or night.




## Supported Carriers

-  UPS-Including International
-  Fed Ex-Ground and Air
-  US Mail
-  Common Carriers
-  Speedee Delivery

## Features

- One Solution for All Your Shipping Needs
- Rate Shopping
- Process Any Miscellaneous Shipment
- Easy Access to Jobs and Releases
- Combine Items in Cartons
- Capture Billing Information at Shipping Time
- Update Order or Release in Real Time
- Electronic Manifests for UPS and FedExGround
- Print Labels in Advance or When Shipping
- International Shipping
- Daily Shipping Report
- Carrier Detail Reports
- Standard Bill of Lading / Packing List Form
- Thermal Bar Code Labels for UPS and FedExGround
- On-Line Tracking
- Automated Per Carton and Shipment Handling Charges
- On-Line Tracking
- Automatically Display Customer Routing Requests
- Export Documents
- Combine Orders, Releases, Misc. Items in one shipment

## Options

-  Customized Labels, Packing Lists or Bills of Lading
-  Interactive Web Pages
-  Bar Code Reader
-  Electronic Scale Interface

## Standard Reports

-  Omni Ship Report of Daily Shipments
-  Thermal Address Label
-  UPS Labels
-  Commercial Invoice for UPS International
-  UPS Shipping Detail Report
-  Fed Ex Ground Labels

The screenshot displays the SAP Sales Order Entry (VA01) interface. At the top, a menu bar includes 'Sales Order Entry', 'Sales Order Header', 'Sales Order Items', 'Sales Order History', 'Sales Order Status', 'Sales Order Print', 'Sales Order Cancel', and 'Sales Order Archive'. The 'Sales Order Entry' tab is selected.

**Sales Order Header Data:**

- Sales Order Number:** 600225
- Carrier:** UPS
- Service Level:** 3 Day Select
- Kind:** Standard
- Shipper ID:** 001481905

**Sales Order Items Data:**

- Item:** 001
- Description:** 001
- Quantity:** 1
- Unit:** EA
- Material:** 001
- Description:** 001
- Quantity:** 1
- Unit:** EA

**Sales Order History Data:**

- Date:** 03.11.00
- Time:** 10:00
- User:** J

**Sales Order Status Data:**

- Status:** 00
- Reason:** 00
- Date:** 03.11.00
- Time:** 10:00
- User:** J

**Sales Order Print Data:**

- Print Date:** 03.11.00
- Print Time:** 10:00
- Print User:** J

**Sales Order Cancel Data:**

- Cancel Date:** 03.11.00
- Cancel Time:** 10:00
- Cancel User:** J

**Sales Order Archive Data:**

- Archive Date:** 03.11.00
- Archive Time:** 10:00
- Archive User:** J

**Sales Order Entry Data:**

- Sales Order Number:** 600225
- Carrier:** UPS
- Service Level:** 3 Day Select
- Kind:** Standard
- Shipper ID:** 001481905

**Sales Order Header Data:**

- Sales Order Number:** 600225
- Carrier:** UPS
- Service Level:** 3 Day Select
- Kind:** Standard
- Shipper ID:** 001481905

**Sales Order Items Data:**

- Item:** 001
- Description:** 001
- Quantity:** 1
- Unit:** EA
- Material:** 001
- Description:** 001
- Quantity:** 1
- Unit:** EA

**Sales Order History Data:**

- Date:** 03.11.00
- Time:** 10:00
- User:** J

**Sales Order Status Data:**

- Status:** 00
- Reason:** 00
- Date:** 03.11.00
- Time:** 10:00
- User:** J

**Sales Order Print Data:**

- Print Date:** 03.11.00
- Print Time:** 10:00
- Print User:** J

**Sales Order Cancel Data:**

- Cancel Date:** 03.11.00
- Cancel Time:** 10:00
- Cancel User:** J

**Sales Order Archive Data:**

- Archive Date:** 03.11.00
- Archive Time:** 10:00
- Archive User:** J

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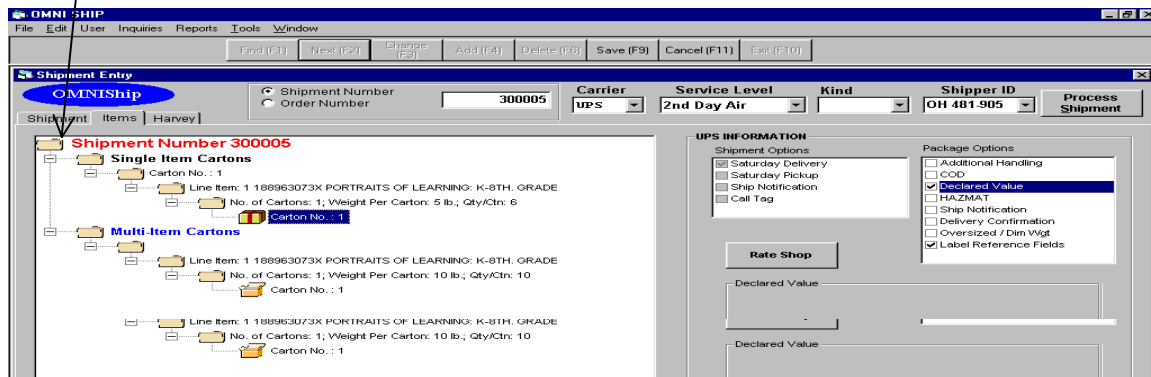
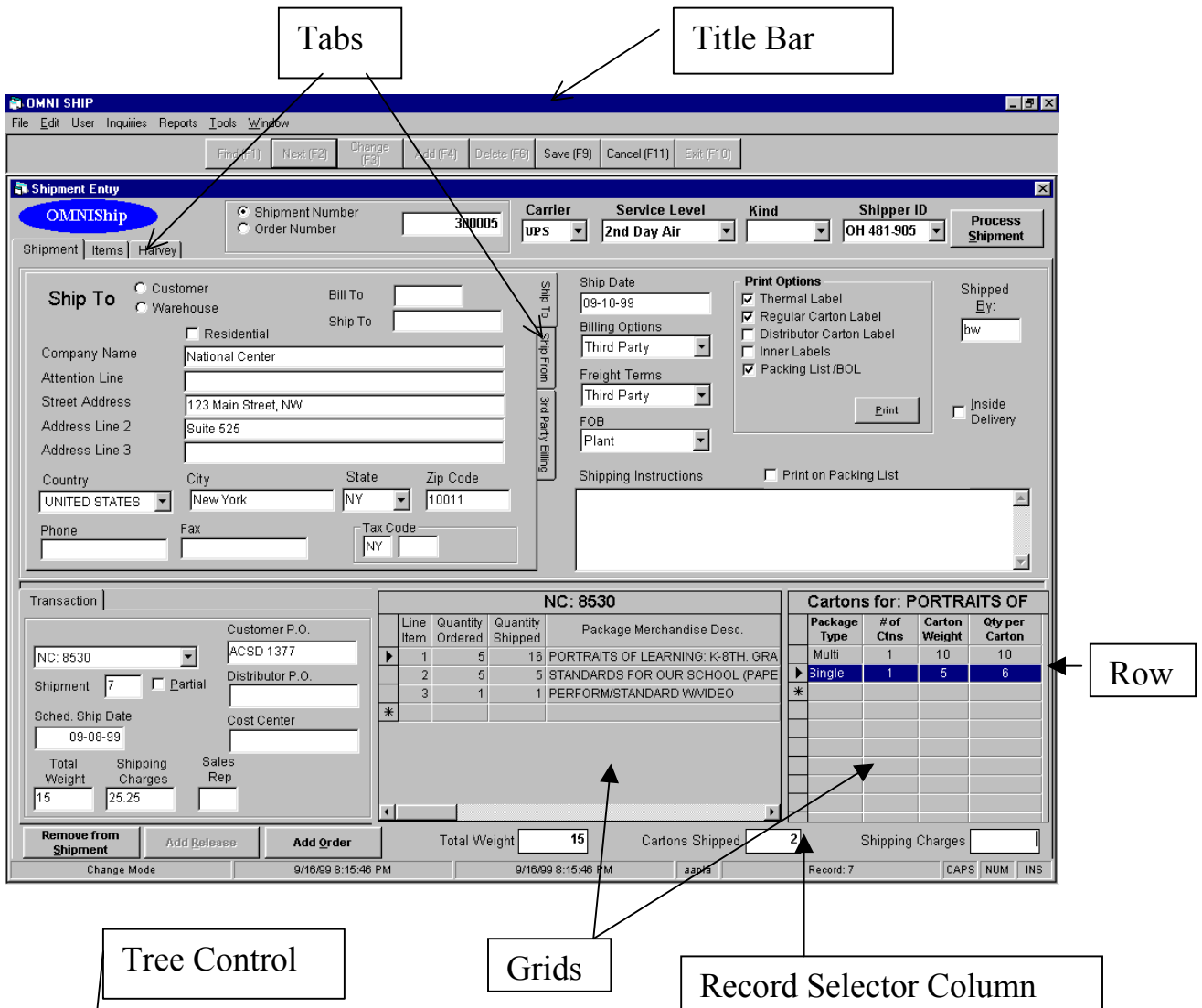
# VISUAL SYSTEM BASICS

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## TERMINOLOGY

To clarify communications, many of the standard terms that are used throughout Plantrol's Visual Systems are defined below, and shown on the associated screen shot.

Term	Meaning
Window	The rectangular portion of your screen that displays an open program or the contents of a folder or file. You can have multiple windows open at the same time.
Click	Refers to clicking the left mouse button once.
Double-click	Refers to quickly clicking the left mouse button twice.
Right-click	Refers to clicking the right mouse button once.
Grid	The area where data is displayed in columns and rows.
Title Bar	The solid area at the top of the window where the Title of the window is displayed.
Column	Data displayed in a vertical column.
Row	Data displayed in a horizontal row.
Heading	The title given to a column of data.
Record selector column	The column to the left of the data in the grid. An arrow is displayed pointing to the active row.
Refresh	Clicking the Refresh button will update the data in the active window without closing the window.
Tree control	A manner of viewing data that allows you to view only the predominant file name, or all the subsidiary file names as well.
Drill down	Display the underlying details of a job or a field. Position the cursor in the record selector column and click, or double click on a field. The specific drill downs available are customized in each system.
Speed Keys, Hot Keys, or Shortcut Keys	A quick way to get the cursor to move to a field without using the mouse. The underlined letter in the field title indicates that you can press the Alt key with the indicated letter, and the cursor will move to that field.







## Omni Ship Windows

## WORKING WITH WINDOWS

There are many ways to resize or move windows, most of which are common with standard Windows tools. Using these tools, you can have many windows open at one time, and view the information within them simultaneously, or even move data between them.

### Window Control Buttons

You can resize or close open windows by clicking one of the window control buttons located on the far right of the title bar.

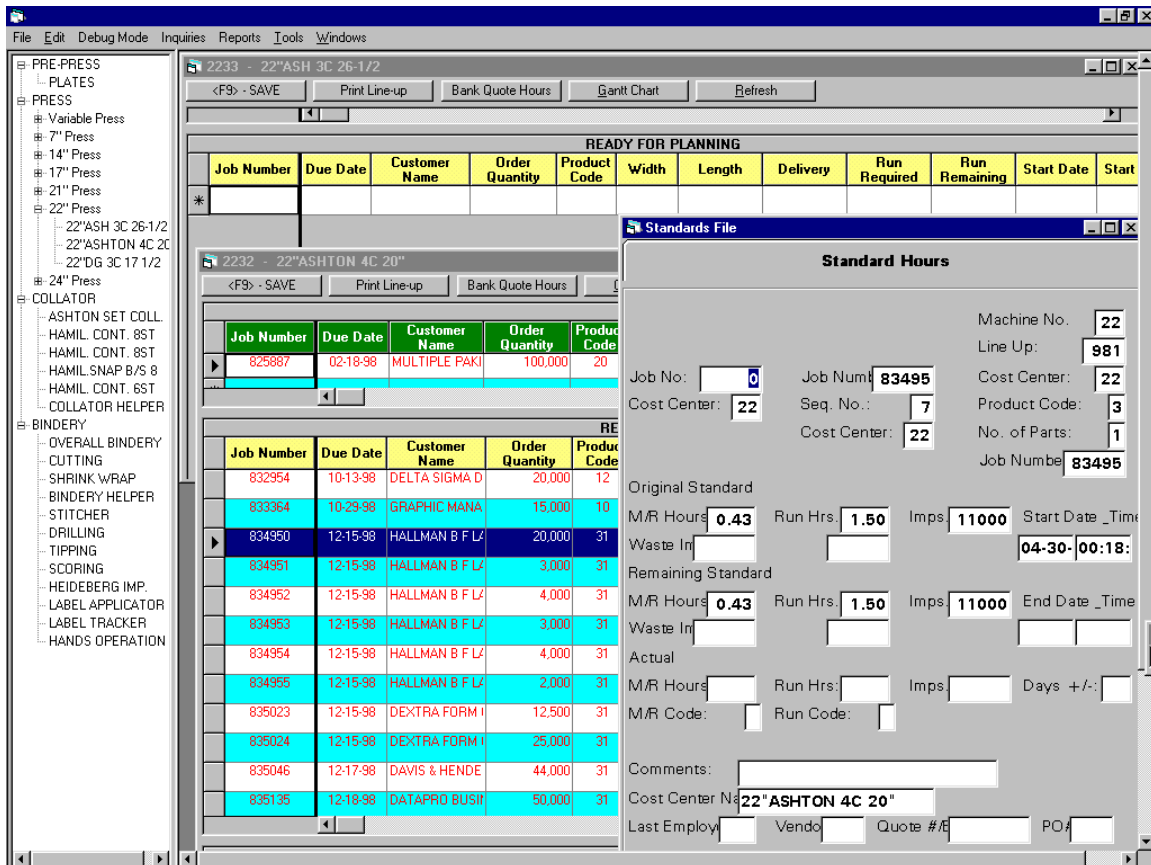
Button	Name	Use to
	Minimize	Minimize a window. A minimized window is still open. A window button appears on the taskbar.
	Maximize	Enlarge a window to its largest possible size.
	Restore	Return a window to its previous size
	Close	Close a window.

### How to Resize a Window by Dragging

1. Position the cursor on the edge or corner of the window you want to resize until the cursor turns into a bi-directional arrow.
2. Click and hold down the left mouse button as you use the mouse to move the window boundary.
3. Release the mouse button when the boundary is where you want it.

## How to Move a Window

1. Click in the Title Bar of the window and continue to hold the left mouse button down as you drag the window to its new location.
2. Release the mouse button when the window is where you want it.



## Working with Multiple Windows

You can have multiple windows open at one time.

Only one window is active at a time.

The active window is the one with the colored title bar. The inactive window's title bars are gray.

To make a window active, click within it. It will become active and come to the front of the other windows.

## **CUSTOMIZING YOUR VIEW**

### **Working with Columns**

The width and depth of most display fields, as well as their order, fonts and alignment are fully customizable by each user. In this section we will describe the use of the tools which allow you to change the width and the order of the columns, and to lock columns at the left.

#### **Changing the width of the columns**

In order to display the full text of a field, you may want to widen the column.

1. Position the cursor in the heading to the right of the column you want to affect, until the cursor changes to a bi-directional arrow.
2. Click and hold the left mouse button down as you move the right boundary of the column left or right.
3. Release the mouse button when the column is the width you want.

#### **Moving the columns**

You will want to order the columns in the most meaningful view for you.

1. Click on the column heading. This selects the column. You will see it change color.
2. Click again and hold down the left mouse button as you use the mouse to drag the column to its new location. You will see the cursor change as the item starts to move.
3. Release the mouse button when the column is where you want it.

#### **Locking columns at the left**

*Note: This functionality does not apply to Omni Ship.*

Columns that are locked at the left will remain in position in the window when you scroll right in the grid. A small white area is visible between the locked area and the rest of the grid.

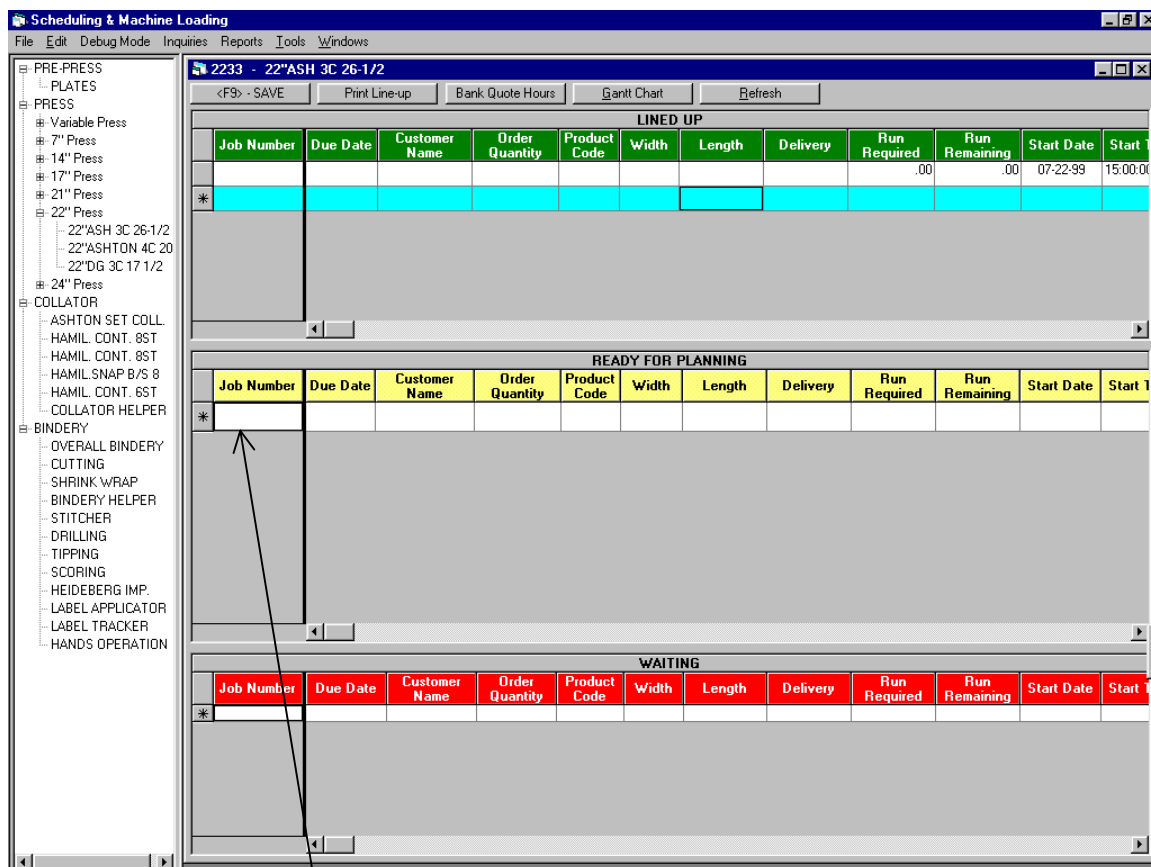
It is recommended that the job number column be locked at left. If you wish, you can lock additional columns as well. To add columns to the locked area, first unlock any columns that are already in the locked area.

#### **How to Unlock columns**

1. Double click on an item within the grid of the locked area.
2. The menu displays.
3. Click on “Unlock”.
4. The area is no longer locked.

## How to lock columns at the left

1. Move the columns you wish to lock at the left to the leftmost area of the grid.  
(See “Moving the Columns” above.)
2. Double click on an item within the grid of the rightmost column which is to be locked at the left.
3. The menu displays.
4. Click on “Lock at left”.
5. The columns are locked.



The Job Number column is locked at left in all three grids shown.

## **Changing the Appearance of Headings and Columns**

The column settings tool gives you the ability to change the font, alignment, text, and number of lines of the column heading. You can also affect the font and alignment of the body of the column. (You can also select to hide certain columns from view, although the procedure for this is not detailed here.) The fore and background colors of the columns can also be adjusted, but these are preset and should not be changed! A change will affect the functionality of the system.

### **Changing the type font of a heading or a column.**

1. Double click on an item in the column. (not the heading)
2. The menu displays.
3. Click on “Column Settings”
4. To change the heading font, in the “Headings” section, click Font.
5. Use the mouse to highlight your selections. Click OK.
6. To change the column font, in the “Body” section, click Font.
7. Use the mouse to highlight your selections. Click OK.
8. Click OK.

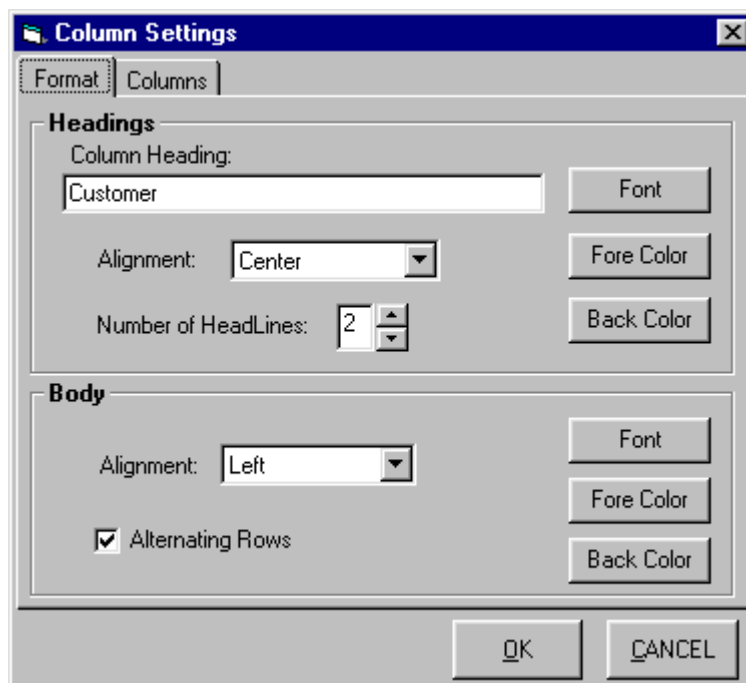
### **Changing alignment of a heading or a column.**

1. Double click on an item in the column. (not the heading)
2. The menu displays.
3. Click on “Column Settings”
4. To change the alignment of the heading, in the “Headings” section, click the down arrow in the alignment box.
5. Select CENTER, LEFT, RIGHT, or GENERAL by hovering over and clicking your selection.
6. To change the alignment of the column, in the “Body” section, click the down arrow in the alignment box.
7. Select CENTER, LEFT, RIGHT, or GENERAL by hovering over and clicking your selection.
8. Click OK.



## Changing heading text, or number of lines in the heading.

1. Double click on an item in the column. (not the heading)
2. The menu displays.
3. Click on “Column Settings”
4. To change the heading text, in the “Column Heading” text box, type the new heading.
5. To change the number of lines in the heading, in the “Number of Headlines” box, click on the up or down arrows to select the number of lines.
6. Click OK.



**The Column Settings Dialog Box**

## **Working with Rows**

To further enhance the readability of your windows, you can make the rows within the grid taller or shorter as you prefer. Alternate row highlighting can also be added to the grids.

### **Changing the height of the rows**

In order to display the full text of a field, you may want to increase the height of the rows.

1. Position the cursor in the record selector column on the boundary between two rows, until the cursor changes to a bi-directional (up and down) arrow.
2. Click and hold the left mouse button down as you move the boundary of the row up or down.
3. Release the mouse button when the row is the height you want.

### **Adding alternate row highlighting to the grid**

4. Double click on an item in the grid.
5. The menu displays.
6. Click on “Column Settings”
7. Click on “Alternating Rows” to check the box.
8. Click OK.

### **Removing alternate row highlighting from the grid**

1. Double click on an item in the grid.
2. The menu displays.
3. Click on “Column Settings”
4. Click on “Alternating Rows” to remove the check from the box.
5. Click OK.

File Edit Debug Mode Inquiries Reports Tools Windows

2226 - 17"ASHTON 4C 26"

<F9> - SAVE Print Line-up Bank Quote Hours Gantt Chart Refresh

### LINED UP

Job Number	Start Time	Days Ahead	Hours in front of	Form Number	Product	Inks Face	Delay Code	Inks Back	Part Info	Late Comm	Plate Complete	Sched De
835214	15:00:00	-198	0	7002	Cont Multi Ptt Cn	469BRN			CB-NTC 32.0			01-
835132	17:56:24	-214	2.94	03-505 12/98	Snapsets	185RED		185RED	CB 42.0 11-1		12-15-98 11:	12-
835100	23:08:24	-190	6.54	MASTERPL	Cont. Singles Pa	BLCK			REG BOND 4		12-09-98 20:	01-
835220	03:27:00	-203	17.75		Cont Multi Ptt Cn	BLCK			CB-NTC 32.0			01-
835064	08:19:12	-221	20.92		Cont Multi Ptt Gk	561GRN			CB 32.0 9-5			12-
835212	10:46:48	-200	23.38		Snapsets	417GRY			REG BOND 2			01-
835155	13:09:36	-217	25.76	148CAN 12/9	Snapsets	BLCK		BLCK	CB 32.0 11-5			12-

### READY FOR PLANNING

Job Number	Due Date	Customer Name	Order Quantity	Product Code	Width	Length	Delivery	Run Required	Run Remaining	Start Date	Star
835175	01-04-99	DESIGN LITHO I	40,000	20	8-1/2	11	MUST	3.73	3.73	07-27-99	11:30
835184	01-06-99	HALLMAN B F L	10,000	12	8-1/2	10-1/8	STND	1.68	1.68	07-27-99	16:50
835200	01-07-99	SRC BUSINESS	8,750	10	8-1/2	12	MUST	3.72	3.72	07-27-99	18:31
835185	01-06-99	HALLMAN B F L	15,000	12	8-1/2	10-1/8	STND	2.26	2.26	07-27-99	23:50
835128	12-21-98	J.F. MOORE LIT	33,750	20	8-1/2	11-1/2	MUST	4.46	4.46	07-28-99	02:06
835108	12-18-98	EBF ASSOCIATE	5,000	11	8-1/2	10	MUST	2.10	2.10	07-28-99	08:09
835149	01-07-99	MEDIREX	25,000	50	8-1/2	9-1/2	STND	4.28	4.28	07-28-99	10:15
54686801	07-16-99							1.19	1.19	07-28-99	16:08

### WAITING

Job Number	Due Date	Customer Name	Order Quantity	Product Code	Width	Length	Delivery	Run Required	Run Remaining	Start Date	Star
829767	04-30-98	GRAPHIC MAN		91	8-1/2	11-1/2	MUST	.00	.00	07-28-99	16:08
834798	12-23-98	J. R. SALES	60,000	51	8-1/2	9-1/2	STND	5.21	5.21	07-28-99	17:19
834991	12-30-98	DENISON PRIN	75,000	11	8-1/2	9-1/2	MUST	6.52	6.52	07-29-99	00:08
835054	12-17-98	E.P.M. BUSINE	25,000	11	8-1/2	12	STND	2.03	2.03	07-29-99	08:15
835065	12-17-98	LONDON BUSI	7,000	12	8-1/2	10-1/4	STND	1.30	1.30	07-29-99	10:17
835194	04-01-99	EMVBRIDGE PRI	50,000	20	8-1/2	11-5/8	MUST	4.11	4.11	07-29-99	11:36

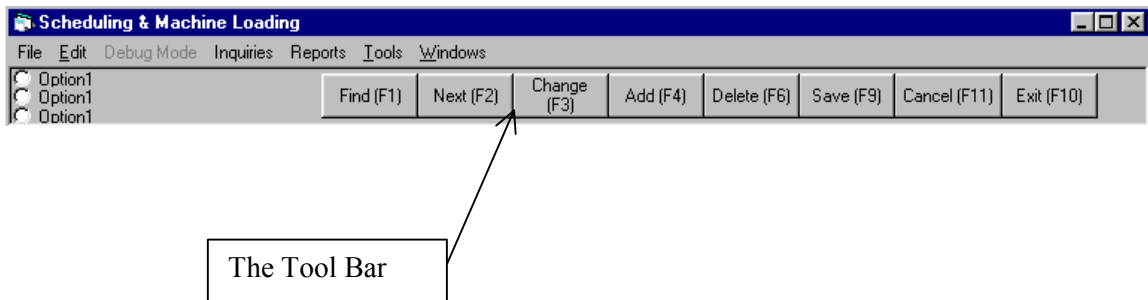
The middle grid above, "Ready for Planning", has alternate row highlighting turned on. The top and bottom grids do not. Also notice the different row heights between grids. These windows are taken from the Plantrol Scheduling and Machine Loading module.

## TOOL BARS AND MENUS

A standard tool bar is used throughout Plantrol systems. You can click the button on the tool bar, or use the associated function key to perform the task. Available menus display at the top, just below the title bar.

### The Tool Bar

The Tool Bar is toggled on and off by clicking on “Toggle Toolbar” on the Window Menu. Not all options on the tool bar are active at any one time. The choices that are not available are grayed out. The chart below lists all possible choices.



BUTTON TITLE	FUNCTION KEY	USE TO
Find	F1	Find a new record.
Next	F2	Find the next sequential record. Shift F2 will find the previous record.
Change	F3	Make changes to the record.
Add	F4	Add a new record.
Delete	F6	Delete the current record.
Save	F9	Save changes to the record.
Cancel	F11	Clear the screen.
Exit	F10	Close the window.

## Using Menus

In the example below, taken from the Scheduling and Machine Loading module, the user clicked on File, and then on File Maintenance. Additional choices are now displayed

The menu bar displays just below the title bar.

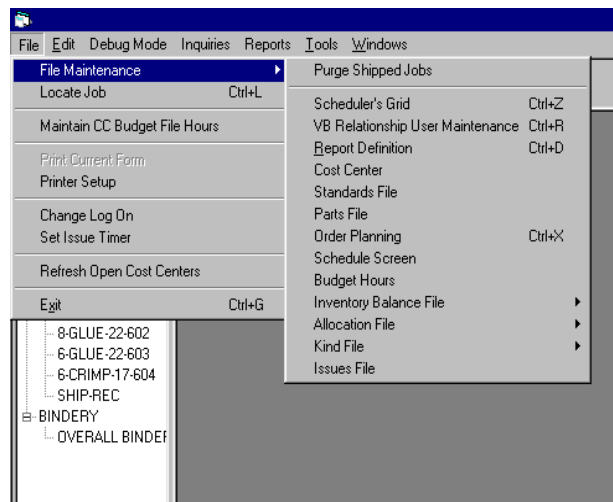
Click on the menu name to display the menu.

A right pointing arrow at the right of the menu indicates further choices are available.

There may be several levels to the menus.

Speed key options are shown to the right of the menu item.

You can use the speed keys to activate the menu choice without going to the menu.



# SETTING UP THE SYSTEM

---

Although most of the set up will normally be done prior to installation, it is helpful to understand the steps required. Of course, there are minimum system requirements for the PC, printers, or other accessories used. These are listed below, as well as an overview of the steps that must be taken both in Harvey's CPS system, as well as directly in Omni Ship.

## SYSTEM REQUIREMENTS

Stated in generalities – check with Plantrol for specifics for your system

PC – Minimum Windows 95 or higher – 300 mhz – Pentium – 64 mb – 1024X768 resolution – 17" monitor.

Compatible modem

Devoted phone line

Thermal printer

Printers for custom labels and other documents – check with Plantrol for compatibility

PC Anywhere for remote support

## CONFIGURING THE SOFTWARE

**The "Setup" program in Harvey CPS must be run on each PC in the installation.** (Start → Programs → CPS for Windows → Setup CPS) This program may be run again at any time to change the default information or add carriers. Also, the program "Tools" can be used to make minor changes. **We recommend that you consult with Plantrol before using these programs.** The items which are designated in this program include:

User company name and address to be used for UPS billing, as well as default return address.

For UPS and other carriers used – account number, service and document preferences.

Thermal label and report printer information

Default settings

The system defaults for Omni Ship are accessed from the file menu.

Select Setup Options – Omni Ship Options and Settings to display the box below.

**Interface to Harvey.** Selecting the interface to Harvey will enable UPS, FedEx Ground, FedEx, and US Postal interface.

**Use Log On Name as Shipped By.** This allows you to avoid having to input the “shipped by” information on every shipment.

**Suppress Print Window.** The print window alerts you that a report has been sent to the printer and can be turned off here. The print window provides useful information during the setup process.

**Harvey assign FEX #.** If the optional FedEx server software is being used on the PC, check this box to automatically assign airbill numbers.

**Scale Port.** Indicate if a scale has been interfaced to Omni, and its Com port.

**Scale Type.** Specify scale type if used.

**Form names, print queues, and special form names.** Indicate the que for each custom form, and input any special form names in the box. Access to this area allows you to change these at any time.

**The default report printer** is set by choosing: File → Setup Options → Printer Setup. This printer must also be chosen as the default printer on the PC.

# HOW TO PROCESS SHIPMENTS

## UNDERSTANDING THE SHIPMENT ENTRY WINDOW

The shipment entry window is where you will be doing most of your work. It is used to enter and process new shipments or to display saved shipments. You need to know your way around this window. To open the shipment entry window, click on User → Process Shipments.

The screenshot shows the OMNI SHIP Shipment Entry window. Callouts point to various sections:

- A: Shipment**: Points to the Shipment Number/Order Number field (100662).
- B: Carrier**: Points to the Carrier dropdown menu (UPS).
- C: Addresses**: Points to the Ship To section (Customer/Warehouse).
- D: Freight Billing**: Points to the Service Level dropdown menu (Ground).
- E: Printing Options**: Points to the Print Options section (Thermal Label, Standard / GPO, Distributor, Packing List/BOL).
- F: Order Information**: Points to the Order Info section (Order No. 75949, Shipment 1, Sched. Ship Date 05-14-99).
- G: Item Information**: Points to the Item table (Quantity Ordered, Quantity Shipped, Start Number, End Number, Missing Numbers, Package Merchandise Desc.).
- H: Package Details**: Points to the Cartons for: LASER table (Package Type, # of Ctns, Carton Weight, Qty per Carton).
- I: Add or Remove Buttons**: Points to the Remove from Shipment, Add Release, and Add Order buttons.
- J: Shipment Totals**: Points to the Total Weight, Cartons Shipped, and Shipping Charges fields.

**Shipment Entry Window Details:**

**Ship To:** Customer (selected), Warehouse (unselected). Bill To: 155500. Ship To: [blank]. Residential: [unselected].

**Company Name:** ASSOCIATED PRINTING SERVICE  
**Attention Line:** MF TRIBUS LEE INSURANCE AGENCY  
**Street Address:** 13 STATION ROAD  
**Address Line 2:** [blank]  
**Address Line 3:** [blank]

**Country:** UNITED STATES, **City:** LINCOLN PARK, **State:** NJ, **Zip Code:** 07035  
**Phone:** [blank], **Fax:** [blank], **Tax Code:** NJ

**Ship Date:** 09-07-99  
**Billing Options:** Shipper  
**Freight Terms:** PPD/Add  
**FOB:** Plant

**Print Options:** Thermal Label (checked), Standard / GPO (unchecked), Distributor (unchecked), Packing List/BOL (unchecked). Print on Packing List (unchecked), Inside Delivery (unchecked). Shipped By: SW

**Order Info:** Order No. 75949, Shipment 1, Sched. Ship Date 05-14-99, Total Weight 50, Shipping Charges 16.87.

Quantity Ordered	Quantity Shipped	Start Number	End Number	Missing Numbers	Package Merchandise Desc.
2000	2500	00201	005700		LASER VOUCHER - 202 RED

**Cartons for: LASER**

Package Type	# of Ctns	Carton Weight	Qty per Carton
Single	2	20	1000
Single	1	10	500

**Remove from Shipment** **Add Release** **Add Order** **Total Weight** 50 **Cartons Shipped** 3 **Shipping Charges** 17.87

9/13/99 4:34:26 PM 9/13/99 4:41:28 PM aapla Record: 4 CAPS NUM INS



## Shipment Entry Window – Area Definitions

Item	Name	Used For
A	Shipment Identification	Shipment or order number. Used to FIND shipments.
B	Carrier info	Shipment carrier. Some carriers, like UPS, also have Service Levels and shipper ID numbers.
C	Addresses	The ship-to address and ship-from address are visible by clicking on the appropriate tab. Third party billing info will appear under a tab if needed.
D	Freight Billing	Freight bills can go to the shipper, receiver, or a third party. If a Bill of Lading is printed, the billing address will depend on your choices.
E	Printing Options	UPS or RPS barcode labels can be generated, as well as custom labels, packing lists, or bills of lading. These can be printed as you need them or automatically generated when the shipment is processed.
F	Order Information	Information is retrieved directly from the Order Entry, Forms Management, or other custom system.
G	Item Information	Quantity ordered, shipped, numbering and other information for multiple items. Most of this will be displayed automatically when package information is input.
H	Package Details	Package weights and quantities are input here.
I	Add or Remove Buttons	You can add orders, releases, and miscellaneous items to the same shipment.
J	Shipment Totals	Shipment information is displayed as you add items or packages. After processing, the shipment charges are shown.

## HOW TO SHIP AN ORDER OR RELEASE

The steps to process a shipment are always the same, although certain steps may vary slightly. A procedure, which flows top to bottom and left to right through the computer form, allows the most efficient process. Base your steps on the order below.

1. Click on ADD AN ORDER or ADD A RELEASE. (A form similar to the one below is displayed.)
2. Input the job or release number. Verify that this is the correct order. If it is not, click the CANCEL button and input the correct number.
3. If more than one ship to address is available, select the correct address by clicking "Use Address".
4. Click the OK button.

The screenshot shows a Windows-style dialog box titled "Add Custom Order to Current Shipment". The dialog has a blue title bar with a close button (X) in the top right corner. The main area is divided into several sections. At the top, there are two input fields: "Job Number" and "Bill To". Below these is a section titled "Ship To" which includes a checkbox labeled "Use Ship To" (which is checked). Under the "Ship To" section are four input fields: "Name", "Street Address", "City / State / Zip" (which is split into three sub-fields), and "Zip". To the right of the "Ship To" section are two vertical buttons: "Ship To" and "Ship From". Below the "Ship To" section is a "Shipping Instructions" section with a large text area. At the bottom of the dialog, there are three input fields: "Customer P.O.", "Distributor P.O.", and "Scheduled Ship Date". To the right of these fields are two buttons: "OK" and "CANCEL".

NOTE: The order or release information is now displayed in the window as shown below.

5. Select Carrier and Service level (if appropriate).
6. Select payment terms.
7. Enter your initials.
8. Enter carton information (package type, number of cartons, weight, and quantity).

9. Repeat steps 1 to 8 to add additional orders to the shipment.
10. If UPS or other carrier's additional services are required, click on the Items tab and select them.
11. Select the documents you wish to generate when the shipment is processed.
12. Click PROCESS SHIPMENT.
13. Click OK when prompted.

**NATIONAL OMNI SHIP**

File Edit User Inquiries Reports Tools Window

Find (F1) Next (F2) Change (F3) Add (F4) Delete (F6) Save (F9) Cancel (F11) Exit (F10)

**Shipment Entry**

**OMNISHIP**

Shipment Number: 400106

Carrier: UPS Service Level: Ground Kind: Shipper ID:

Ship To: Customer Warehouse Bill To: DOMFO Ship To: Ship Date: 10-18-99

Company Name: TOWN OF NORWOOD Attention Line: Street Address: ATTN: KEN THOMAS Address Line 2: 116 SOUTH MAIN Address Line 3:

Country: UNITED STATES City: NORWOOD State: NC Zip Code: 28128-0697

Phone: Fax:

Print Options: ☒ Thermal Address Label ☒ Regular Carton Label ☐ Distributor Carton Label ☐ Packing List / BOL

Shipped By: AAPLA

Freight Terms: PPD/Add FOB: Plant: Air Bill / Pro Number: Inside Delivery: ☐ From Warehouse: ☐

Shipping Instructions: ☐ Print on Packing List

**Order Info**

Order No.: ORDER: 409107700 Customer P.O.: Distributor P.O.: 60229H Cost Center:

Shipment: 2 ☒ Partial Sched. Ship Date: 10-23-98

Total Weight: 70 Shipping Charges: 24.98 Sales Rep:

**ORDER: 409107700**

Quantity Ordered	Quantity Shipped	Package Merchandise Desc.	Start Number	End Number	Missing Numbers
3000	2954	C/F UTILITY BILLS	1001	4050	96

**Cartons for: C/F UTILITY**

Package Type	# of Ctns	Carton Weight	Qty per Carton
Single	4	15	650
Single	1	10	450

Remove from Shipment Add Release Add Order Total Weight: 70 Cartons Shipped: 5 Shipping Charges: 24.98

Viewing 11/7/99 5:58:17 PM 11/7/99 6:01:24 PM aapla Record: 133 CAPS NUM INS

This shipment has already been processed. The PROCESS SHIPMENT button has been replaced with the "shipped" icon.

## HOW TO SHIP A MISCELLANEOUS ITEM

A “miscellaneous item” is any item that is not already defined on an order or release. This may be items being returned to a vendor, sales material being sent to a customer, or a personal item being shipped from work. Miscellaneous items can be combined with orders and releases in one shipment if they are all going to the same address by the same method.

Follow the steps below to ship a miscellaneous item by itself.

1. Click MISCELLANEOUS on the Orders tab. (A shipment number is assigned.)

The screenshot shows the 'NATIONAL OMNI SHIP' software interface. The 'Shipment Entry' window is open, displaying various fields for shipment information. The 'Miscellaneous' tab is selected, and a callout box points to the 'Miscellaneous' dropdown menu in the 'Misc.' section.

**Shipment Entry**

OMNISHIP

Shipment Number: 400107

Carrier: UPS Service Level: Ground Kind: Shipper ID: Process Shipment

Ship To: Customer Bill To: Ship To: Residential

Company Name: Attention Line: Street Address: Address Line 2: Address Line 3: Country: UNITED STATES City: State: Zip Code: Phone: Fax:

Ship Date: 10/18/99

Billing Options: Shipper

Freight Terms: PPD/Add

FOB: Plant

Print Options: Thermal Address Label Regular Carton Label Distributor Carton Label Packing List / BOL

Shipped By: AAPLA

Air Bill / Pro Number: Inside Delivery: From Warehouse: Print on Packing List

Shipping Instructions:

Misc. \* Miscellaneous \*

Quantity Ordered	Quantity Shipped	Package Merchandise Desc.	Item Number	Line Item	Inventory Unit	Unit Quantity	Package Type	# of Ctns	Carton Weight	Qty per Carton
*										

Shipment: Partial

Sched. Ship Date:

Total Weight: Shipping Charges: Sel. Pk. Fee:

Remove from Shipment Add Release Add Order Total Weight: Cartons Shipped: Shipping Charges:

Change Mode CAPS NUM INS

Select  
MISCELLANEOUS  
here.

2. Input the ‘Ship To’ address. A company name, street address, city, state, and zip code are required. On line help (Shift F12) is available to access the “bill to” and “ship to” files your system includes.

3. Your company name and address will default into the “from” area. Click the “Ship From” tab and change the information if you need to.
4. Select Carrier and Service level (if appropriate).
5. Select payment terms.
6. Enter your initials in the “Shipped By” field.
7. Enter the Package Merchandise Description.

**NATIONAL OMNI SHIP**

File Edit User Inquiries Reports Tools Window

Find (F1) Next (F2) Change (F3) Add (F4) Delete (F5) Save (F9) Cancel (F11) Exit (F10)

**Shipment Entry**

OMNISHIP

Shipment Number: 400107

Carrier: UPS Service Level: Next Day Air Kind: Shipper ID: Process Shipment

Ship To: Customer Bill To: Ship To: Residential Plantrol Systems

Company Name: Attention Line: Street Address: 100 Bourne Street Address Line 2: Address Line 3: Country: UNITED STATES City: Westfield State: NY Zip Code: 14787 Phone: Fax:

Ship Date: 10/18/99 Print Options: ☒ Thermal Address Label ☐ Regular Carton Label ☐ Distributor Carton Label ☐ Packing List / BOL Shipped By: AAPLA

Billing Options: Shipper Freight Terms: Prepaid FOB: Plant Air Bill / Pro Number: Inside Delivery: From Warehouse: Print on Packing List: Shipping Instructions:

Misc. \* Miscellaneous \*

Line Item	Quantity Ordered	Quantity Shipped	Package Merchandise Desc.	Item Number	Inventory Unit	Unit Quantity (FPU)	Parts
1	1	1	PC to be configured				

Cartons for: PC TO BE

Package Type	# of Ctns	Carton Weight	Qty per Carton
Single	1	35	1

Total Weight: 35 Cartons Shipped: 1 Shipping Charges:

Remove from Shipment Add Release Add Order Change Mode CAPS NUM INS

Input the Merchandise Description before entering the carton information.

8. Enter carton information (number of cartons, weight, and quantity).
9. If UPS or other carrier’s additional services are required, click on the Items tab and select them.
10. Select the documents you wish to generate when the shipment is processed.
11. Click PROCESS SHIPMENT.
12. Click OK when prompted.

## HOW TO SHIP ITEMS TOGETHER

There are many benefits to combining jobs, releases, or both into one shipment, not the least of which is reduced shipping cost. Using the ADD ORDER and ADD RELEASE buttons, you can easily ship items together. Simply follow the steps listed under “How to Ship an order or release”. You can even add a miscellaneous item to the shipment, following the normal steps.

After the first item you enter, the information on the top half of the shipment window will remain the same. Only the item and package information will change as you add additional items, as shown below.

You can remove an order from the shipment by displaying the order, and pressing the REMOVE FROM SHIPMENT button.

**NATIONAL OMNI SHIP**

File Edit User Inquiries Reports Tools Window

Find (F1) Next (F2) Change (F3) Add (F4) Delete (F5) Save (F9) Cancel (F11) Exit (F10)

**Shipment Entry**

OMNISHIP

Shipment Number: 400108

Carrier: UPS Service Level: Ground Kind: Shipper ID: Process Shipment

Ship To: Customer Warehouse Residential

Bill To: DOMFO Ship To:

Company Name: TOWN OF NORWOOD

Attention Line:

Street Address: ATTN: KEN THOMAS

Address Line 2: 116 SOUTH MAIN

Address Line 3:

Country: UNITED STATES City: NORWOOD State: NC Zip Code: 28128-0697

Phone: Fax:

Ship Date: 10/18/99

Billing Options: Shipper

Freight Terms: PPD/Add

FOB: Plant

Print Options:

Thermal Address Label

Regular Carton Label

Distributor Carton Label

Packing List / BOL

Print

Shipped By: AAPLA

Inside Delivery

From Warehouse

Shipping Instructions:

Print on Packing List

Order Info:

Order No.:

ORDER: 146350700

\*Miscellaneous\*

ORDER: 146350700

ORDER: 409107700

ORDER: 800080800

U4-26-99

Total Weight: 1090

Cartons Shipped: 55

Shipping Charges:

Change Mode: 11/7/99 6:14:23 PM 11/7/99 6:14:23 PM aapla Record: 134 CAPS NUM INS

The orders combined in this shipment can be displayed by clicking on the Order No. down arrow. Click on an order number to display its package and item information.

## How to Combine Jobs in One Carton

You can process shipments with multiple items in one carton without indicating which cartons contain which items. However, you may prefer to be more specific for your internal records. This can be done using the carton types “multi” and “other”. The steps are detailed below. This example assumes items from two orders are combined.

1. Add the first order to the shipment. Use carton type “Multi”.
2. Add the next order to the shipment. Use carton type “Other”. Do not enter a carton weight.
3. Add additional orders to the shipment, the same as step 2.
4. Click on the ITEMS tab. Click all + nodes to expand the tree. The shipment below has 4 items – all will be shipped in one carton.

The screenshot displays the OMNI SHIP Shipment Entry window. The top menu bar includes File, Edit, User, Inquiries, Reports, Tools, and Window. Below the menu is a toolbar with buttons for Find (F1), Next (F2), Change (F3), Add (F4), Delete (F5), Save (F9), Cancel (F11), and Exit (F10). The main window is titled "Shipment Entry" and features a tabbed interface with "Shipment", "Items", and "Harvey" tabs. The "Shipment" tab is active, showing a summary of the shipment: Shipment Number 100696, Carrier UPS, Service Level Ground, and Shipper ID NY 125-356. A "Process Shipment" button is located to the right of the summary. The "Items" tab is also visible, showing a tree structure of items. The tree is expanded, showing four orders: Order 75949 (LASER VOUCHER - 202 RED), Order 74951 (CN104-174 MOD 3 PAGE 94 OF 132), Order 74952 (CN104-174 MOD 3 PAGE 95 OF 132), and Order 75950 (LASER VOUCHER - 199 RED). Each order has a "Quantity of 20" and a "Carton No. 1" indicated by a red question mark. The "UPS INFORMATION" section on the right includes "Shipment Options" (Saturday Delivery, Saturday Pickup, Ship Notification, Call Tag) and "Package Options" (Additional Handling, COD, Declared Value, HAZMAT, Ship Notification, Delivery Confirmation, Oversized / Dim Wgt, Label Reference Fields). A "Rate Shop" button is also present. The "Label Reference Fields" section includes a "Special Note" field and two "Reference" fields (Reference 1 and Reference 2). The bottom status bar shows "Change Mode" and "CAPS NUM INS".

5. The “?” question marks indicate items that have not yet been packed in cartons. Since these are to be packed in carton no. 1 we’ll drag them into open “Carton No. 1”. Click to highlight a “?” carton, then click again and hold the left mouse button down as you drag it to the open carton. Release the left mouse button. Repeat the same procedure for each “?” carton.

## 6. Click Process Shipment

OMNI SHIP

File Edit User Inquiries Reports Tools Window

Find (F1) Next (F2) Change (F3) Add (F4) Delete (F5) Save (F6) Cancel (F11) Exit (F10)

Shipment Entry

OMNISHIP

Shipment Number: 100696

Carrier: UPS

Service Level: Ground

Shipper ID: NY 125-356

Shipment Items Harvey

Shipment Number 100696

Multi-Item Cartons

Order: 75949

Line Item: 1 LASER VOUCHER - 202 RED

No. of Cartons: 1, Weight Per Carton: 1 lb., Qty/Ctn: 20

Carton No.: 1

1 Quantity of 20

Packed In Other Cartons

Order: 74951

Line Item: 1 CH104-174 MOD 3 PAGE 94 OF 132

1 Quantity of 20

Order: 74952

Line Item: 1 CH104-174 MOD 3 PAGE 95 OF 132

1 Quantity of 20

Order: 75950

Line Item: 1 LASER VOUCHER - 199 RED

1 Quantity of 20

UPS INFORMATION

Shipments Options

☐ Saturday Delivery

☐ Saturday Pickup

☐ Ship Notification

☐ Call Tag

Package Options

☐ Additional Handling

☐ COD

☐ Declared Value

☐ HAZMAT

☐ Ship Notification

☐ Delivery Confirmation

☐ Oversized / Dim Vglt

☐ Label Reference Fields

Rate Shop

Label Reference Fields

Special Note

Reference 1

Reference 2

Viewing Q/15/00 2:38:24 PM Q/15/00 2:53:25 PM aapla Record: 28 CAPS NUM INS

In the example above, the “?” cartons have been dragged into Carton No. 1

In the example below shows how the shipment appears after it has been processed.

OMNI SHIP

File Edit User Inquiries Reports Tools Window

Find (F1) Next (F2) Change (F3) Add (F4) Delete (F5) Save (F6) Cancel (F11) Exit (F10)

Shipment Entry

OMNISHIP

Shipment Number: 100696

Carrier: UPS

Service Level: Ground

Shipper ID: NY 125-356

Shipment Items Harvey

Shipment Number 100696

Multi-Item Cartons

Order: 75949

Line Item: 1 LASER VOUCHER - 202 RED

No. of Cartons: 1, Weight Per Carton: 1 lb., Qty/Ctn: 20

Carton No.: 1

1 Quantity of 20

Packed In Other Cartons

Order: 74951

Line Item: 1 CH104-174 MOD 3 PAGE 94 OF 132

1 Quantity of 20

Order: 74952

Line Item: 1 CH104-174 MOD 3 PAGE 95 OF 132

1 Quantity of 20

Order: 75950

Line Item: 1 LASER VOUCHER - 199 RED

1 Quantity of 20

UPS INFORMATION

Shipments Options

☐ Saturday Delivery

☐ Saturday Pickup

☐ Ship Notification

☐ Call Tag

Package Options

☐ Additional Handling

☐ COD

☐ Declared Value

☐ HAZMAT

☐ Ship Notification

☐ Delivery Confirmation

☐ Oversized / Dim Vglt

☒ Label Reference Fields

Rate Shop

Label Reference Fields

Special Note

Reference 1

Reference 2

Change Mode CAPS NUM INS

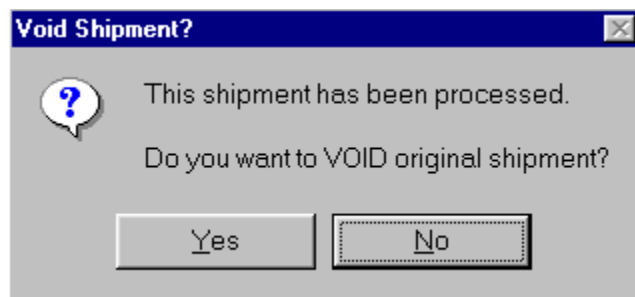


## CHANGING OR DELETING SHIPMENTS

To change or delete a saved shipment, you must first FIND it, and then CHANGE or DELETE it. If a shipment for a Harvey supported carrier is to be changed, the original shipment is deleted, and a new shipment number is created.

### Type 1 - Shipments that have been processed through Harvey (UPS)

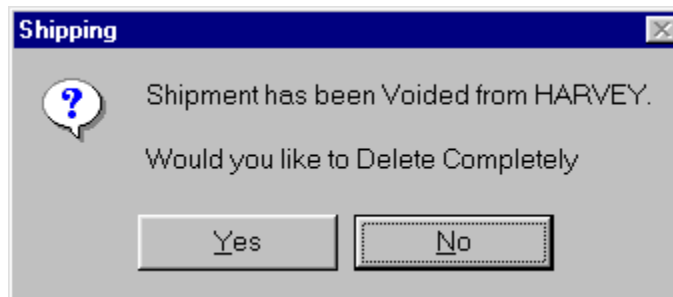
7. CANCEL if necessary to bring the cursor to the Order Number field at the top.
8. Input the job number you wish to recall or click "Shipment Number" and input the shipment number you wish to recall.
9. The following message will appear. Click YES. Clicking NO will allow you to view the shipment only. Clicking YES will void (delete) the shipment from the Harvey files.



4. Next, the following message will appear.

To delete the shipment, answer YES. The shipment will be deleted.

To make a change to the shipment, answer NO. A new shipment number will be assigned, and the old shipment deleted.

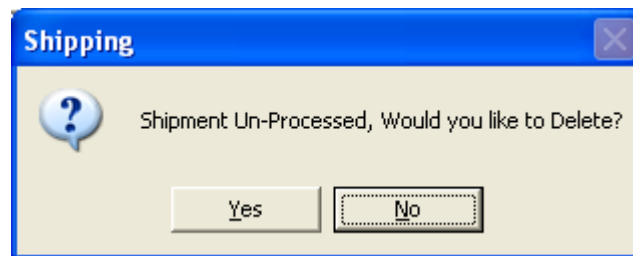


## Type 2 - Truck and other processed shipments

1. CANCEL if necessary to bring the cursor to the Order Number field at the top.
2. Input the job number you wish to recall. Or, click “Shipment Number” and input the shipment number you wish to recall. The message below will appear.



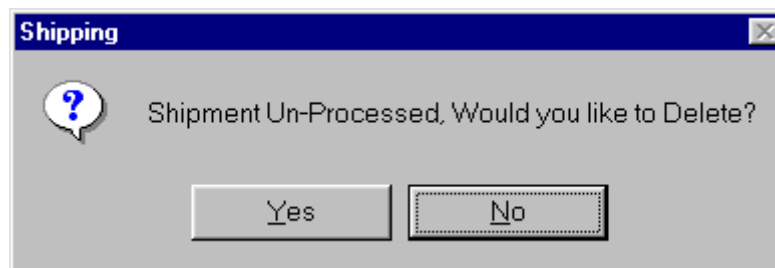
3. Click YES to un-process the shipment. Click NO just view the processed shipment. The Message below will appear.



4. To delete the shipment, click YES. To make a change to the shipment, click NO.

## Type 3 – Un-processed shipments

1. CANCEL if necessary to bring the cursor to the Order Number field at the top.
2. Input the job number you wish to recall. Or, click “Shipment Number” and input the shipment number you wish to recall. The following message will appear.



3. To delete the shipment, click YES. To make changes to the shipment click NO.

# HOW TO END THE SHIPPING DAY

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## HOW TO END THE UPS SHIPPING DAY AND UPLOAD THE MANIFEST TO UPS.

At the end of the shipping day, the manifest information is transmitted to UPS, and the driver scans a bar coded summary label. Updates are run to verify the UPS charges and update other system files. Daily reports are printed and the day's shipments are moved to the history file. Here is a detailed procedure, followed by an abbreviated checklist. *Your end of day procedure may also include processes to complete the day's shipping for other carriers.*

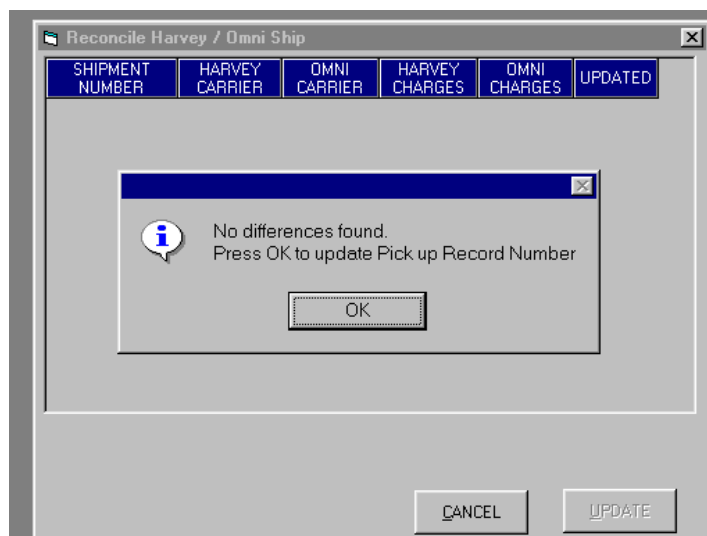
1. Complete all UPS shipments for the day.
2. Close Omni Ship and CPS on any slave PC's.
3. Close the "Process Shipment" window by clicking CANCEL and then clicking on the "x".
4. Click on CPS on the task bar to open the daily entry window. You need to be in "Find" mode. If in "Add" mode, click the cancel button until "Find" is displayed at the top of the screen.
5. Click on the process menu. Select End of Day reports.
6. When prompted, click OK to print the summary label.
7. When prompted, click OK to print the detail report. Verify the number of air packages and other types listed are correct. Any corrections to shipments should be made before proceeding.
8. Click on the process menu. Select Transmit Data. When prompted, click OK to print the summary label. Watch to see that the transmission was successful.
9. Minimize the CPS daily entry window.
10. Click on the User Menu. Select "Reconcile Harvey and Omni Ship" to update any UPS rate adjustments. Click UPDATE, and OK when prompted. You may click PRINT to have a report of changes if you wish. Click QUIT.
11. Click on CPS on the task bar to open the daily entry window.
12. Click on the process menu. Select Move to History. When processing is complete, click OK.
13. Minimize the CPS daily entry window.
14. Click on the Reports Menu, or use the Ctrl P speed key to display the Reports Menu.
15. Select the Omniship report. Input the beginning ship date and ending ship date as today's date. Click PRINT. (Also select any custom reports you may wish to print daily.) Click CANCEL to close the report window.
16. Click on the User Menu. Select "Set the new Ship Date." Input the new date and click OK.
17. Click on the User menu, update orders - to update the interfaced systems with the shipping information.
18. Close Omniship and any other open programs, and reboot your PC.
18. Click on the User Menu, Process Shipments to start shipping with the new date.

## DAILY CHECKLIST

End of Day Reports - CPS  
Transmit Data - CPS  
Reconcile Harvey and Omni Ship  
Move to History - CPS  
Print Omni Daily Shipping Report  
Set new ship date  
Update orders  
Reboot PC's

### What the Reconcile program does

The Reconcile program ensures that your packages are rated the least expensive way. As part of the "Transmit Data" step, CPS checks your shipments and ensures that any that qualify for Hundredweight pricing receive it. (Note: UPH and FXG multi weight rates are estimated until this end-of-day step is done.) The Reconcile brings the revised rates back into the Omni files, and changes the method from UPS to UPH. Conversely, if shipments have been entered as UPH that do not qualify, they will be rated as UPS. The pick up record number is also written to the Omni files.

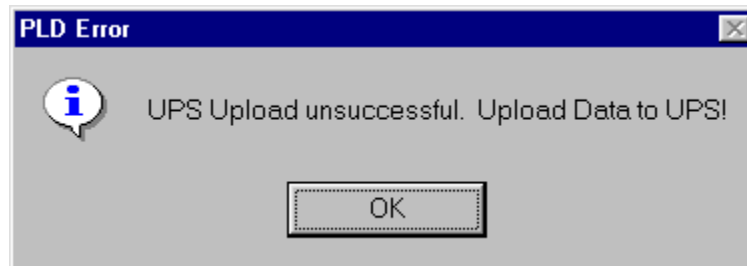


## HOW TO DEAL WITH ERRORS UPLOADING TO UPS

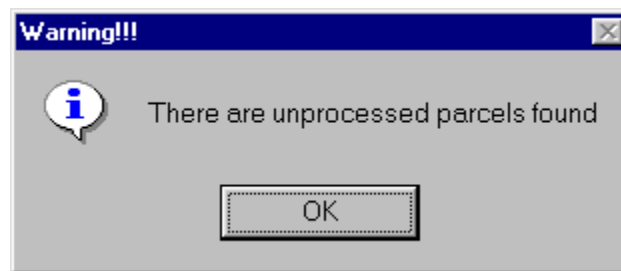
It is not uncommon to encounter difficulties with the UPS transmissions. Many things can be the cause of the problems including UPS network problems, phone line disruptions, or internal modem or data errors. Most can be corrected by re-transmitting until you receive a

“Transmission Successful” message. Listed below are messages you may see, and suggestions for how to proceed if you do.

AN ERROR HAS OCCURRED IN YOUR TRANSMISSION. YOUR FILE MAY NOT HAVE BEEN RECEIVED SUCCESSFULLY BY UPS!



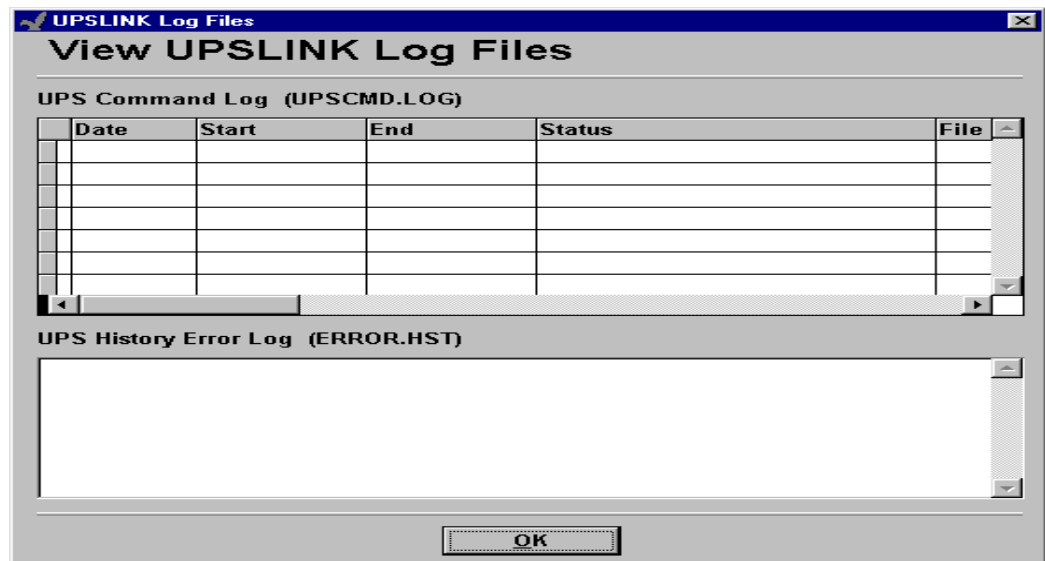
Either of the messages above alert you to a problem with the transmission. Depending on when you encounter this message, the CPS system may immediately try the transmission again, without any further input from you. If not, click OK and then TRANSMIT DATA to try again. Depending on the cause of the problem, you may need to do this more than once to eliminate the error condition.



The message above will be seen when there are packages that have been transmitted to UPS, but have not yet been moved to History. There is another more severe version of this warning, which insists that you immediately move to history before proceeding.

## **How to tell if your UPS transmission was successful**

1. Click START → PROGRAMS → CPS for WINDOWS → VIEW UPSLINK Log Files.
2. This will display the window below. You will see a list of your transmissions to UPS. Look for “SUCCESSFUL” in the Status column to determine if the file was received without error.



## How to resend a file requested by UPS

If you are contacted by UPS and asked to resend a previous day's transmission, follow these steps:

- Close Omni-Ship.
- Click START → Programs → CPS for Windows → Upload Previous Day File.
- Select the file you want to transmit from the CPSPLD subdirectory.
- Press OK to confirm the selection or Cancel to exit the program without transmitting.

If you don't know what file to transmit, you can double click the icon that says "List Previous Day's Files" in the CPS → Reports → Electronic Data Transmission folder. This will give a listing of the previous files. The file name includes the pickup record number, which is the book and page number.

You can also print out a report for this pickup record number, by going to the Standard Report Folder inside of Reports, and double-clicking " Shipping Detail History Report." Input the 7 digit pickup record number and date of the file you wish to print

# UPS SHIPPING

## SELECTING UPS SERVICE LEVELS

UPS offers a variety of Service Levels. These can be viewed by clicking on the down arrow next to the Service Level window. You must first select UPS as the carrier. The Service Level window is shown below.

The screenshot shows the 'ALLIED OMNI SHIP' application window. The 'Shipment Entry' tab is active, and the 'OMNISHip' button is highlighted. The 'Carrier' dropdown is set to 'UPS'. The 'Service Level' dropdown is open, showing a list of service options: Ground, Next Day Air, Next Day Air Saver, Next Day Air Early AM, 2nd Day Air, 2nd Day Air AM, and 3 Day Select. A callout box labeled 'UPS Service Levels' points to this dropdown menu. The 'Ship To' section is filled out with customer information, including 'OUR FAVORITE CUSTOMER' and '1480 MAIN STREET'. The 'Order Info' section at the bottom shows 'ORDER: 182508' and a table with one line item: 'INV-FB-1 FRUIT BASKET INVOICE' with a quantity of 5000.

Line Item	Item Number	Package Merchandise Desc.	Quantity Ordered	Quantity Shipped	Inventory Unit	Unit Quantity
1	INV-FB-1	FRUIT BASKET INVOICE	5000	5000	CTN	750

## SELECTING THE UPS BILLING OPTION

Several billing options are also available. Select these from the Billing Options window. If you select Third Party Billing, or Bill Receiver, you must input account numbers or other information in the tab that will appear over the ship to area. Bill Shipper and Consignee Billing do not require additional input. The charges will be normally be calculated and displayed, even though the bill may be sent to another party. The UPS shipping detail report will show the billing option chosen.

### Third Party Billing

You must input the third party account number, company name, and address as shown.

The screenshot shows the 'ALLIED OMNI SHIP' software window. The 'Shipment Entry' tab is active, and the 'OMNISHip' button is highlighted. The 'Third Party Billing' section is expanded, showing fields for 'Third Party Account' (123456), '3rd Party Name' (Third Pary Company Name), '3rd Party Attn', 'Street Address' (450 Elm Street), 'Address Line 2', 'Address Line 3', 'Country', 'City' (Jamestown), 'State' (NY), 'Zip Code' (14701), 'Phone', and 'Fax'. The 'Billing Options' dropdown menu is open, showing 'Third Party' selected. The 'Ship Date' is 11-16-99, and the 'Service Level' is Ground. The 'Order Info' section at the bottom shows 'ORDER: 182508' and a table with columns: Line Item, Item Number, Package Merchandise Desc., Quantity Ordered, Quantity Shipped, Inventory Unit, and Unit Quantity. The table contains one row: 1, INV-FB-1, FRUIT BASKET INVOICE, 5000, 5000, CTN, 750.

Line Item	Item Number	Package Merchandise Desc.	Quantity Ordered	Quantity Shipped	Inventory Unit	Unit Quantity
1	INV-FB-1	FRUIT BASKET INVOICE	5000	5000	CTN	750

Choose the billing option here



## Bill Receiver

You must input the receiver account number as shown.

The screenshot shows the 'ALLIED OMNI SHIP' application window. The 'Shipment Entry' tab is active. The 'Receiver Billing' section is visible, with the 'Receiver Account' field containing the value '123456'. The 'Billing Options' dropdown menu is open, showing 'Receiver' as the selected option. The 'Ship Date' is '11-16-99', and the 'Carrier' is 'UPS' with 'Ground' service level. The 'Order Info' section at the bottom shows 'ORDER: 182508' and a table with one line item: '1 INV-FB-1 FRUIT BASKET INVOICE' with 5000 units ordered and shipped.

Line Item	Item Number	Package Merchandise Desc.	Quantity Ordered	Quantity Shipped	Inventory Unit	Unit Quantity
1	INV-FB-1	FRUIT BASKET INVOICE	5000	5000	CTN	750

Choose the billing option here

## USING OPTIONAL UPS SERVICES

UPS optional services can be accessed from the ITEMS tab, after entering the package information on the SHIPMENT tab. Some services are only offered in combination with certain Service Levels.

There are two types of optional services, those that must be applied to the entire SHIPMENT, and those that must be applied to each PACKAGE individually. The two types are grouped in boxes at the right of the screen. The shipment detail is shown graphically at the left using a tree control. The process to apply each type of service is outlined below.

## Shipment Options

These currently include **Saturday Delivery**, **Saturday Pickup**, **Ship Notification**. To add one of these options to a shipment:

1. Enter the shipment as normal, but do not click the PROCESS SHIPMENT button.
2. Click the ITEMS tab (shown below).
3. Click the Shipment Number to enable the shipment options.
4. Click to check the box next to the option you want to add.
5. Complete any additional fields that display when you select the option.
6. If more services are to be added, repeat steps 4 and 5 to select them.
7. Click the PROCESS SHIPMENT button.

Saturday Delivery has been added to the shipment below.

The screenshot shows the 'BELKNAP OMNI SHIP' application window. The 'SHIPMENT ENTRY' tab is active, displaying 'SHIPMENT' and 'ITEMS' sub-tabs. The 'ITEMS' sub-tab is selected, showing a tree view of 'Shipment Number 100908' with 'Single Item Cartons'. The 'UPS INFORMATION' panel on the right shows 'Shipment Options' with 'Saturday Delivery' checked. The 'Package Options' panel shows various options like 'Additional Handling', 'COD', 'Declared Value', 'HAZMAT', 'Ship Notification', 'Delivery Confirmation', 'Oversized / Dim Wgt', and 'Label Reference Fields'. The 'Option Cost' is displayed as '\$0.00'.

Some options will have additional fields to complete. They will be in this area of the form. None are required for Saturday delivery.

## How to enter a Call Tag

Call Tags are also a shipment option. The Call Tag service allows you to instruct UPS to pick up packages from your customer and return them to you.

The call tag must be entered as a miscellaneous shipment.

The call tag will not be shown on your UPS manifest printout, as you will not be billed until UPS has picked up the carton.

A label can be generated for your records. The label does not need to be given to the driver. All information for UPS will be transmitted electronically.

The call tag can be tracked using the tracking number on the label.

1. Click MISCELLANEOUS on the Orders tab. (A shipment number is assigned.)
2. Input the address where the carton is to be picked up in the 'to' address.
3. Click the "From" tab and input the address to which the carton should be returned. (This may be your distributor's name and your address.)
4. Select Carrier and Service level.
5. Select payment terms.
6. Enter your initials.
7. Enter the Package Merchandise Description. Include the job number or other reference information. This will print on the Omniship report.
8. Enter package information – number of packages, weight and quantity per pkg.
9. Click the ITEMS tab.
10. Click the Shipment Number to enable the shipment options.
11. Click Call Tag under the shipment options to check the box.
12. Complete any additional information you choose in the box below.
13. Click the PROCESS SHIPMENT button.
14. A label may be generated for your records. Mark it "call tag" to identify it.

## Package Options

These currently include **Additional Handling, COD, Declared Value, HAZMAT, Ship Notification, Delivery Confirmation, Oversized/Dimensional Weight, and Label Reference Fields**. Listed below is the procedure to add package options to your shipment.

### How to use Package Options

1. Enter the shipment as normal, but do not click the PROCESS SHIPMENT button.
2. Click the ITEMS tab.
3. Click the + symbols to display all cartons.
4. Click the carton to receive the additional service.

You can select multiple cartons by clicking the first one, then holding the Ctrl key down while you click the others.

You can also select a group of cartons by clicking on the carton summary icon.

5. Click to check the box next to the option you want to add.
6. Complete any additional fields that display when you select the option.
7. Repeat steps 4 to 6 for additional cartons and / or services.
8. Click the PROCESS SHIPMENT button.

The package that is selected will be sent COD.

The screenshot shows the 'SHIPMENT ENTRY' window for 'OMNISHIP'. The 'ITEMS' tab is selected, showing a tree view of 'Single Item Cartons' for 'Shipment Number 100933'. Under 'Line Item: 1 PACKAGE DESCRIPTION', there are four cartons. Carton No. 1 is selected. The 'UPS INFORMATION' panel on the right shows 'Package Options' with 'Additional Handling' checked. The 'COD' section shows 'Amount' as \$150.00 and 'PAYMENT METHOD' as 'COMPANY CHECK'. A callout box points to the selected carton and the 'COD' section.

## Selecting multiple packages

When you apply services to the Summary Level (as shown below), all packages contained in the summary will receive the identical service

In the example below, each of the 4 cartons will received a Declared Value of \$325

The screenshot displays the 'BELKNAP OMNI SHIP' application window. The 'Shipment Entry' tab is active, showing a summary for shipment number 100933. The carrier is set to 'ups', service level to 'Ground', and shipper ID to 'NY 111-123'. The 'Process Shipment' button is visible.

The 'Shipment Number 100933' section shows a tree view of 'Single Item Cartons'. Under 'Line Item: 1 PACKAGE DESCRIPTION', there are four cartons listed: 'Carton No. : 1', 'Carton No. : 2', 'Carton No. : 3', and 'Carton No. : 4'. Each carton is associated with a 'No. of Cartons: 4, Weight Per Carton: 10 lb., Qty/Ctn: 1000'.

The 'UPS INFORMATION' section on the right includes 'Shipment Options' (Saturday Delivery, Saturday Pickup, Ship Notification, Call Tag) and 'Package Options' (Additional Handling, COD, Declared Value, HAZMAT, Ship Notification, Delivery Confirmation, Oversized / Dim Vght, Label Reference Fields). The 'Declared Value' field is set to '\$ 325'. The 'Option Cost' is \$0.00.

## USING MULTIPLE UPS ACCOUNT NUMBERS

If approved by UPS, you can use additional UPS account numbers. You must assign a unique three-letter designation to the new account number and use this in place of “UPS” as the carrier choice.

### Limitations

- The shipments for the new account will not receive Hundredweight rates, until after the end of day upload. At that time, any shipments that qualify for Hundredweight rates will be corrected.
- International shipments cannot be entered using additional account numbers. You can, however, enter these as third party billings.
- When UPS rates are updated, you must separately update any additional account numbers. To do this, select CPS for Windows → Tools. Click the Carrier button to open the “create a carrier dialog.” Enter the name of the carrier you wish to update and press OK. The zones and rates will be updated.

Adding a new UPS account number involves the steps listed below.

1. Add the carrier to the auto text file using a unique three-letter designation. (See “How to add or delete a carrier” (page 132).

shiptest - U/Gi Universal Graphical Interface

File Edit Preferences View Transfer Help

AUTOMATIC TEXT FILE MAINTENANCE

Variable Name: SVIA\$

Alpha Flag: (NL If None) UP1

Text 1 2 3 4 5 6 7 8

123456789012345678901234567890123456789012345678901234567890

UP1 Harvey

UPS

NY 123 456 1.25

Numeric Value 1: \_\_\_\_\_ T4010\$: \_\_\_\_\_

Numeric Value 2: \_\_\_\_\_ T5012\$: \_\_\_\_\_

Numeric Value 3: \_\_\_\_\_ T621\$: \_\_\_\_\_ T631\$: \_\_\_\_\_ T641\$: \_\_\_\_\_

Numeric Value 4: \_\_\_\_\_

UPS account Number

MUST be UPS if new carrier is like UPS

UPS Fuel Surcharge percent (if used)

Cre: 3- 6-02 15:42:56 Mod: 3- 7-02 10:34:06 FRANK [ ] Rec #: 16 004

Connected to 120.170.124

5,26 11:25:18

Start Support... QUOT... C:\vbd... Section... shipte... Micros... Plantrol...

**The following steps are done from within the Harvey CPS system.**

2. Set up the account by creating a “custom carrier” with the same three-letter designation on all PC’s. (Step 1)
3. Commission the account by requesting book numbers from UPS electronically.(Step 2)
4. Add the account to the end of day upload by editing the “Transmit Data” report folder and upload list. (Step 3)
5. Enter shipments for the new account by using the three-letter code as the carrier name.
6. Complete the end of day reports and upload to confirm everything works correctly, and correct any problems encountered.

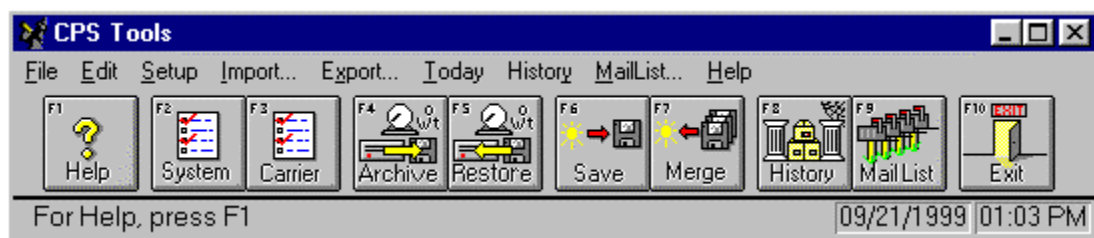
## **Adding an additional UPS account number**

### **STEP 1 – Setting up the new account**

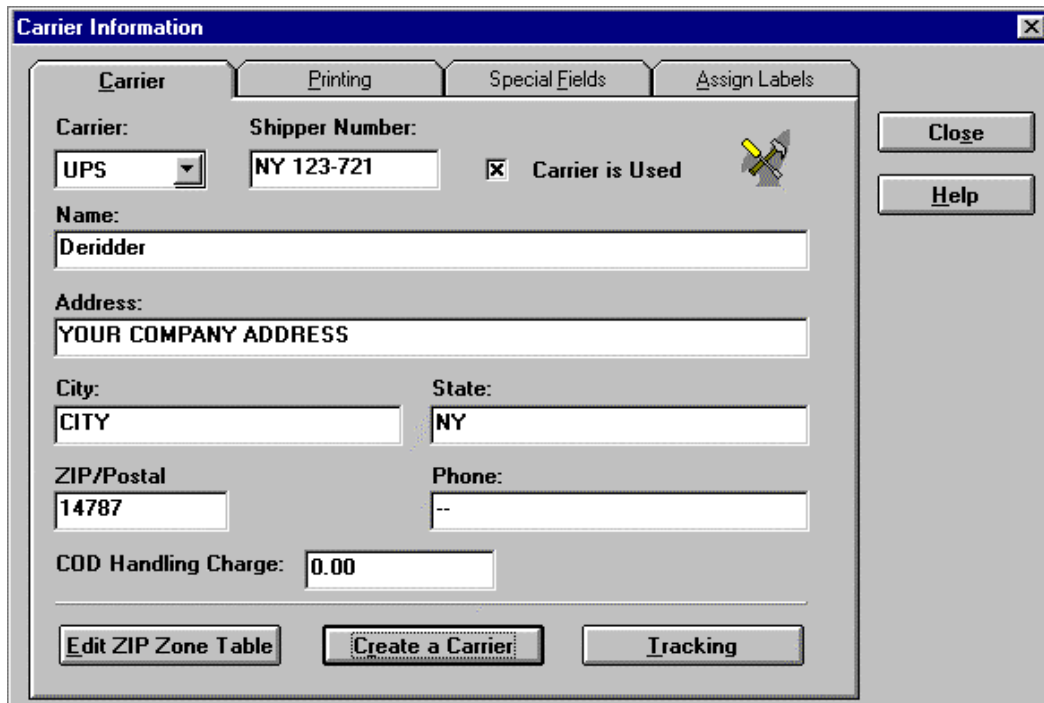
When you select “UPS” as a carrier on a shipment, the account number will be selected that you have set up as your default. To use a different UPS account number, a unique carrier code must be created, for example, UP1 or UP2. CPS calls this new code a “custom carrier”. The new account number must also be “commissioned” by UPS and then added to your end of day processes.

(More information on custom carriers can be found by selecting Start → Programs → CPS for Windows → CPS Online Help → Tools → Configuring CPS → custom carriers.)

1. First follow the procedure to add a new carrier – page 132. The new carrier must have a three letter “alpha flag”.
2. Close Omni ship on all PC’s. On the master PC, select Start → Programs → CPS for Windows → Tools. The CPS Tool Bar is displayed.



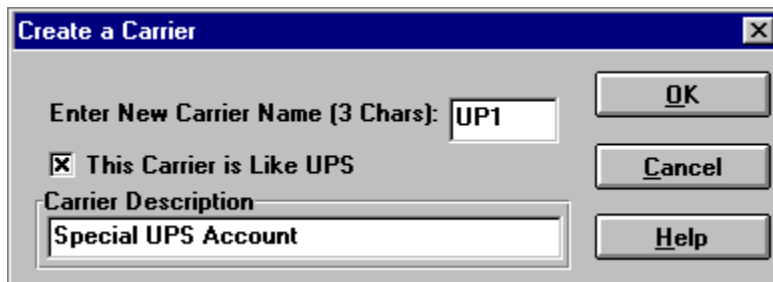
3. Press the Carrier - F3 button. The Carrier Information dialog opens.



The Carrier Information dialog box has a title bar with a close button. It contains four tabs: Carrier, Printing, Special Fields, and Assign Labels. The Carrier tab is active. It features the following fields and controls:

- Carrier:** A dropdown menu showing "UPS".
- Shipper Number:** A text field containing "NY 123-721".
- Carrier is Used:** A checked checkbox.
- Name:** A text field containing "Deridder".
- Address:** A text field containing "YOUR COMPANY ADDRESS".
- City:** A text field containing "CITY".
- State:** A text field containing "NY".
- ZIP/Postal:** A text field containing "14787".
- Phone:** A text field containing "--".
- COD Handling Charge:** A text field containing "0.00".
- Buttons:** "Edit ZIP Zone Table", "Create a Carrier" (highlighted with a dashed border), and "Tracking".
- Right-side buttons:** "Close" and "Help".

4. Press the Create A Carrier button. The Create A Carrier dialog box is displayed.



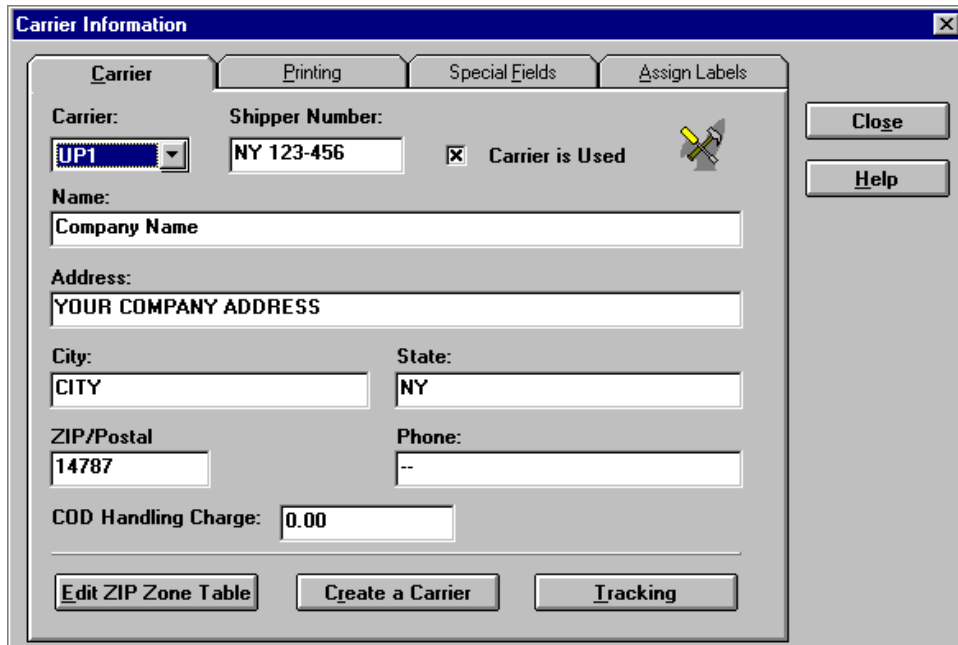
The Create a Carrier dialog box has a title bar with a close button. It contains the following fields and controls:

- Enter New Carrier Name (3 Chars):** A text field containing "UP1".
- This Carrier is Like UPS:** A checked checkbox.
- Carrier Description:** A text field containing "Special UPS Account".
- Buttons:** "OK", "Cancel", and "Help".

5. Enter the three letter "alpha flag" of the new account in the "Enter New Carrier Name" field. It must be three characters in length. Be sure the box next to "Carrier is Like UPS" is checked.

You may also add a description of the carrier in the Carrier Description field. Press OK when you have finished. You will be returned to the Carrier Information dialog, and the new carrier will appear in the Carrier field drop list box.





The image shows a 'Carrier Information' dialog box with a blue title bar and a close button. It has four tabs: 'Carrier' (selected), 'Printing', 'Special Fields', and 'Assign Labels'. The 'Carrier' tab contains the following fields and controls:

- Carrier:** A dropdown menu showing 'UP1'.
- Shipper Number:** A text box containing 'NY 123-456'.
- Carrier is Used:** A checked checkbox next to a yellow wrench and screwdriver icon.
- Name:** A text box containing 'Company Name'.
- Address:** A text box containing 'YOUR COMPANY ADDRESS'.
- City:** A text box containing 'CITY'.
- State:** A text box containing 'NY'.
- ZIP/Postal:** A text box containing '14787'.
- Phone:** A text box containing '--'.
- COD Handling Charge:** A text box containing '0.00'.

At the bottom of the dialog are three buttons: 'Edit ZIP Zone Table', 'Create a Carrier', and 'Tracking'. On the right side of the dialog are two buttons: 'Close' and 'Help'.

6. Change the shipper number to the new account number. The format should be a 2 letter state code, three digits, a hyphen, and three more digits. Also edit the company name and address to the correct billing information. Click CLOSE.

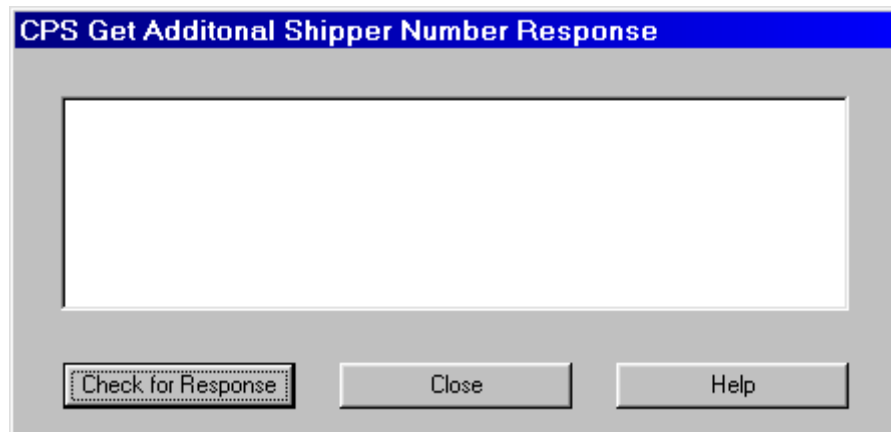
## STEP 2 - Commissioning the new account

After setting up the "custom carrier" with a new three-letter code and account information, the new account must be "commissioned" by UPS with a unique book number. If there is more than one shipper ID to commission, do one at a time, going through all 10 parts of step 2 successfully before commissioning the next shipper ID.

1. Close Omni ship on all PC's. On the master PC, Click on Start → Programs → CPS for Windows → Reports.
2. Maximize the report window titled "Electronic Data Transfer."
3. Double click the icon titled "Send add shipper # request". Choose the 3-letter carrier designation you have added, and click Send Request.



4. An electronic request will be sent to UPS. You can watch the file transfer take place. When it is complete, close the reports program.
5. It will take from 1 to 72 hours to receive the book number back from UPS. To retrieve this information, again close Omni on all PC's. Click Start → Programs → CPS for Windows → Reports.
6. Maximize the report window titled "Electronic Data Transfer."
7. Double click the icon titled "Get Add Shipper # Response". Click Check for Response, the response will be retrieved electronically from UPS.



8. When the file transfer is complete, double click the Icon “Edit PLD book information”.

**Electronic Data Transmission**

**PLD BOOK NUMBERS** Harvey Software

Shipper Number:

Mail Box ID:

Book Number 1:  Book 1 Page #:

Book Number 2:  Book 2 Page #:

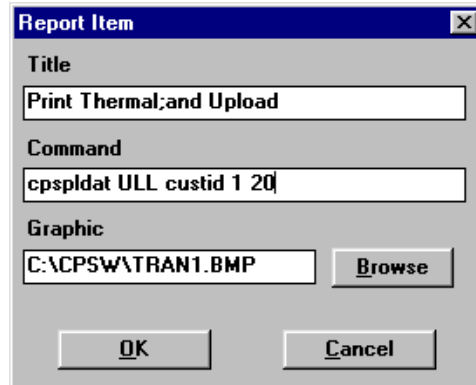
Navigation buttons: Left arrow, Right arrow, Add, Delete, OK

9. Use the arrow buttons to scroll through the list of shipper numbers. If the commissioning was successful, the new shipper number will be visible with a mailbox ID, book and page numbers. (The page numbers will be zeros.) Click OK.
10. If all fields are not filled in, you should delete this record, verify that you have entered the information correctly in the carrier file, and send the request again. You can double click the “View UPSLINK log files” icon to see any error messages that might have been received.

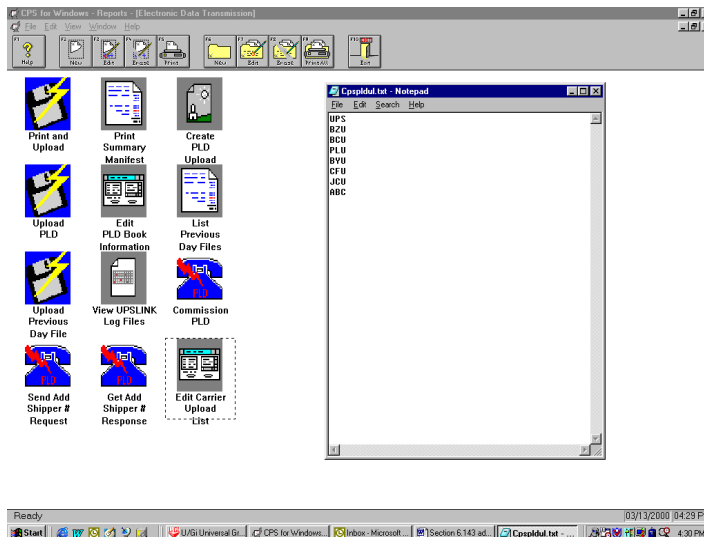
### **STEP 3 – Adding the account to the upload**

Once UPS has commissioned the new account and the book numbers are visible in the PLD book information (step 2), the account must be added to the end of day upload to UPS.

1. Close Omni ship on all PC's. On the master PC, Click on Start → Programs → CPS for Windows → Reports.
2. Maximize the report window titled “Transmit Data”.
3. Click the “Print Thermal and Upload” icon to select it, and then press F3 to EDIT. A report item information box will appear as shown below. In the “Command” box, make changes if necessary to duplicate what is shown below, “cpspldat ULL custid 1 20”. Click OK.



4. Minimize the “Transmit Data” folder.
5. Maximize the Electronic Data Transmission folder.
6. Double click the icon “Edit Carrier Upload List”. This opens the Notepad application allowing you to enter or edit the list of carriers to upload.
7. Type one carrier per line. Be sure to include UPS. See Below.



8. Save the upload file by selecting File, Save and then close Notepad.
9. When you select “Transmit Data” from the CPS process menu, a thermal summary label will be generated automatically for each account, and the list of accounts will be uploaded.

# FED EX GROUND

## SERVICE LEVELS

Fed Ex Ground offers a variety of Service Levels. These can be viewed by clicking on the down arrow next to the Service Level window after selecting FXG as the carrier. The Service Level window is shown below. Service to Hawaii, Alaska, and Canada has specific service levels as shown below.

Service Levels

The screenshot shows the 'Shipment Entry' form. At the top, there's a tabbed interface with 'Shipment', 'Items', and 'Harvey'. The 'Shipment' tab is active. Below the tabs, there's a section for 'Ship To' with radio buttons for 'Customer' (selected) and 'Warehouse'. The 'Customer' section includes fields for 'Company Name' (VILLAGE OF CASSADAGA), 'Attention Line', 'Street Address' (MILL STREET), 'Address Line 2', 'Address Line 3', 'Country' (UNITED STATES), 'City' (CASSADAGA), 'State' (NY), and 'Zip Code' (14718). There are also fields for 'CC', 'Phone', and 'Fax'. To the right of the 'Ship To' section, there's a 'Bill To' section with a 'Bill To' field (300300) and a 'Ship To' field. Above the 'Ship To' section, there's a 'Carrier' dropdown menu set to 'FXG' and a 'Service Level' dropdown menu. The 'Service Level' dropdown is open, showing a list of options: 'US Ground', 'Hawaii Ground', 'Hawaii Ground Outer-Is', 'Alaska Ground', 'Alaska Rural Ground', and 'Canada Ground'. The 'US Ground' option is highlighted. To the right of the 'Service Level' dropdown, there's a 'Kind' dropdown menu and a 'Shipper ID' field (0142524). Below the 'Service Level' dropdown, there's a 'Freight Terms' dropdown menu (PPD/Add), an 'FOB' dropdown menu (Dest.), and a 'Shipping Instructions' field. There's also a 'Packing List / BOL' checkbox and a 'Print on Packing List' checkbox.

## BILLING OPTIONS

Select the billing option from the Billing Options window. If you select “bill receiver”, input the receiver’s account number in the tab that will appear over the ship to area. The charges will be calculated and displayed, even though the bill may be sent to another party. The billing options window is shown below.

### BILL RECEIVER

You must input the receiver account number.

Choose the billing option here.

## OPTIONAL FEDEX GROUND SERVICES

FXG optional services can be accessed from the ITEMS tab, after entering the package information on the SHIPMENT tab. Some services are only offered in combination with certain Service Levels.

There are two types of optional services, those that must be applied to the entire SHIPMENT, and those that must be applied to each PACKAGE individually. The two types are grouped in boxes at the right of the screen. The shipment detail is shown graphically at the left using a tree control. The process to apply each type of service is outlined below.

### Shipment Options – Call Tags

Call tags are a Shipment Option. Follow the instructions below. Call tags must be entered as miscellaneous shipments.

1. Click MISCELLANEOUS on the Orders tab. (A shipment number is assigned.)
2. Input the address where the carton is to be picked up in the 'Ship To' address.
3. Click the "Ship From" tab and input the address to which the carton should be returned. (This may be your distributor's name and your address.)
4. Select Carrier and Service level.
5. Select payment terms.

6. Enter your initials.
7. Enter the Package Merchandise Description. Include the job number or other reference information. This will print on the Omniship report.
8. Enter package information – number of packages, weight and quantity per pkg.
9. Click the ITEMS tab.
10. Click off and then back on the Shipment Number to enable the shipment option.
11. Click Call Tag under the shipment options to check the box.
12. Click the PROCESS SHIPMENT button.
13. A label will be generated for your records. Mark it “call tag” to identify it.

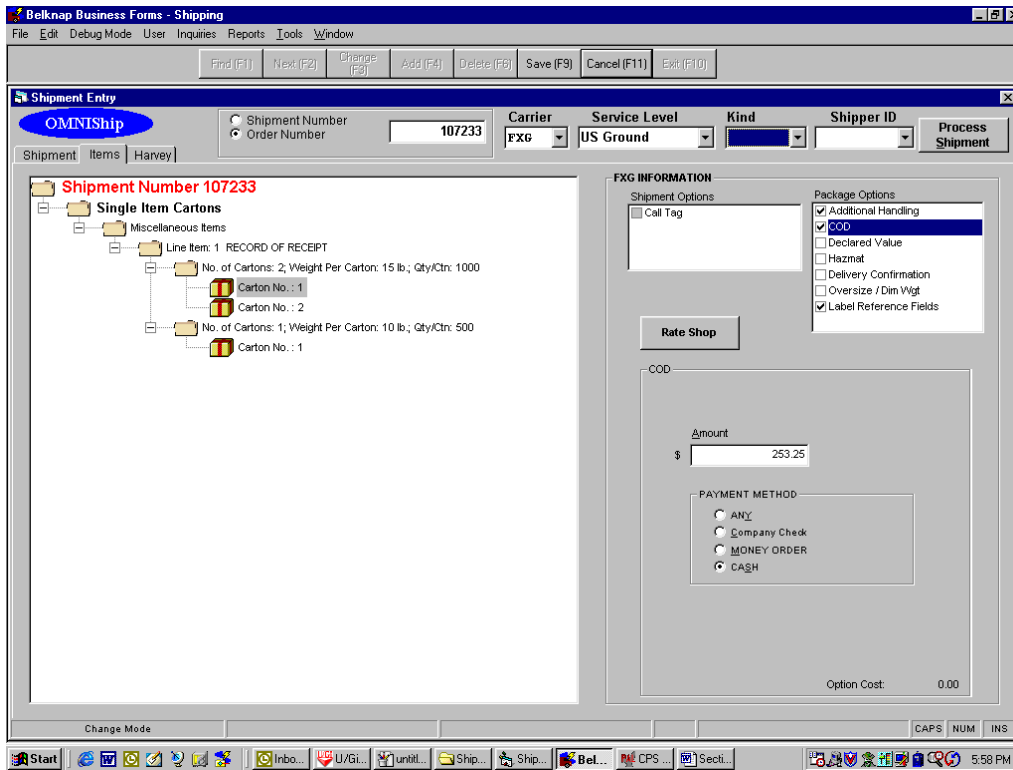
## Package Options

These currently include **Additional Handling, COD, Declared Value, HAZMAT, Delivery Confirmation, Oversized/Dimensional Weight, and Label Reference Fields**. Listed below is the procedure to add package options to your shipment.

### HOW TO USE PACKAGE OPTIONS

1. Enter the shipment as normal, but do not click the PROCESS SHIPMENT button.
2. Click the ITEMS tab.
3. Click the + symbols to display all cartons.
4. Click the carton to receive the additional service.  
You can select multiple cartons by clicking the first one, then holding the Ctrl key down while you click the others.
5. Use the mouse to check the box next to the option you want to add.
6. Complete any additional fields that display when you select the option.
7. Repeat steps 4 to 6 for additional cartons and / or services.
8. Click the PROCESS SHIPMENT button.

Ex: The selected carton will be sent COD with Additional Handling. THE COD amount is \$253.25, to be received in cash.



## FEDEX GROUND END OF DAY

FXG shipment records will not move from the CPS daily file to the CPS history file until they have been printed on a FXG Daily Manifest report. This step will also calculate Multi-weight rates. See below for instructions to set up this report in the “Custom Report Group 1” and when and how to print this report.

If you wish to make FXG shipments, but do not need to print the manifest report, contact Plantrol support for assistance in changing the set up.

Another option is an electronic upload of the packages using EPDI; after setting up the reports, see “Using EPDI” below.

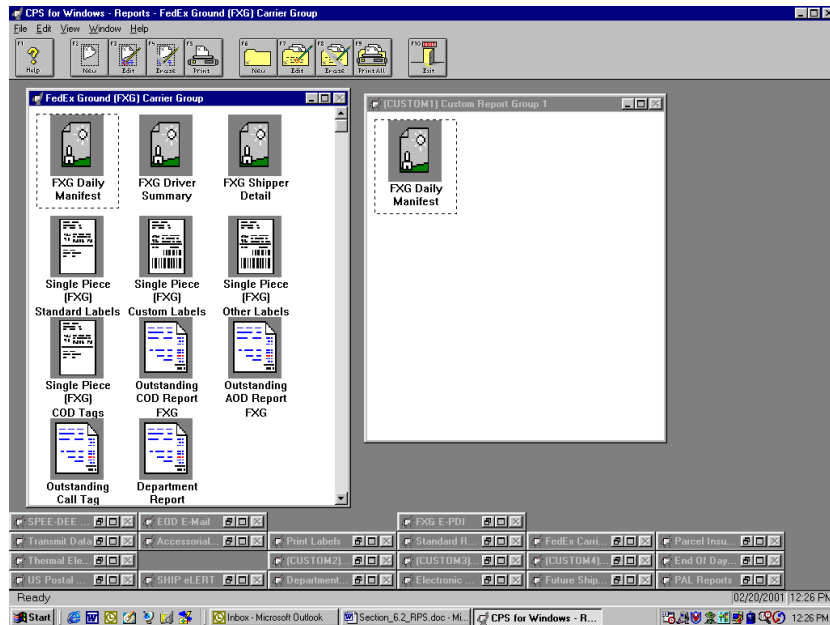
## Initial Set up of Reports

To set up the FXG Daily Manifest in the Custom Report Group 1 folder, click on Start → Programs → CPS for Windows → Reports.

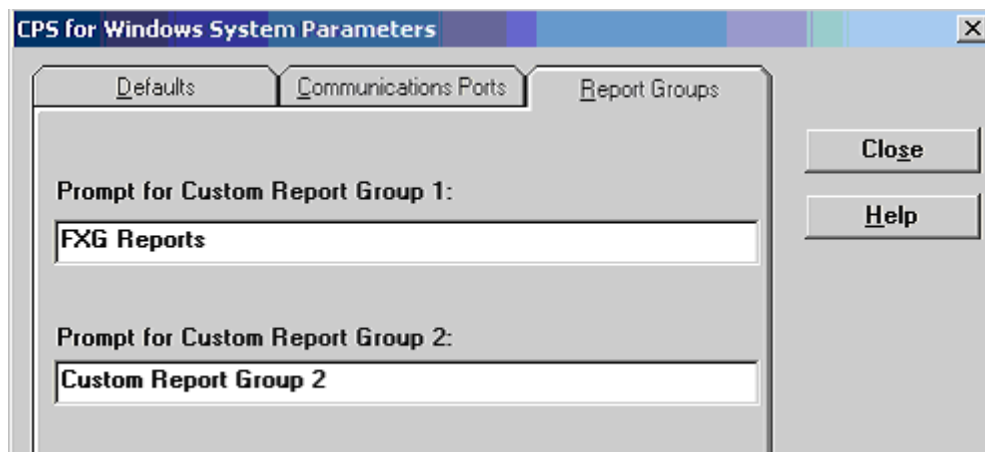
1. Open the “Fed Ex Ground Carrier Group” folder by restoring it from its minimized state.
2. Also open the “Custom Report Group 1” folder and resize it so you can see both windows.



- Click on the “FXG Daily Manifest” icon to select it. Click again and hold the left mouse button down as you drag it to the “Custom Report Group 1” window. When you release the mouse button, you will have a copy of the report in the Custom Report Group folder.
- If you wish, you can drag other reports into this folder. When done, close all windows.



- To rename this option on the process menu, select Start → Programs → CPS for Windows → Tools. Click the “system” button, and then click the “report groups” tab. Change the prompt for custom report group 1 to “FXG reports” or whatever you choose. Click Close, and then click Exit.



## Printing the FedEx Ground Manifest

If you have Fed Ex Ground shipments in your shipping day, click “Custom Report Group 1” or your renamed option “FXG reports” to print this report. Answer any prompts that are presented. You must do this step BEFORE you do the Reconcile and Move to History steps in your end of day process.

Computerized Parcel System for Windows

File Edit Process Help Support

F1 ? Help F3 Transmit Data F4 End Of Day Reports F7.1 +2 3 Totals F8.1 +2 3 Print Total F9 Zero F10 Add F11 Save F12 Tracking

Custom Report Group 1  
Custom Report Group 2  
Custom Report Group 3  
Custom Report Group 4

Find Parcels

Department: Customer ID: Actual Wt (lbs.): 15.000 Today

Name: to person Bill Weight: 15.0

Attention: Dim Weight: 0.000

Address: address Total: \$260.47

Secondary: City: the city State: Postal Code: Country: ALBANIA Phone: Use Printed

Service: UPW: Worldwide Express (907) COD Saturday Confirm Invoice Value Waybill

Tracking #: 1Z1237216610009926

Pcs: 18 Wt: 373.0 ActWt: 373.000 Charges: 3601.96 Costs: 3601.96

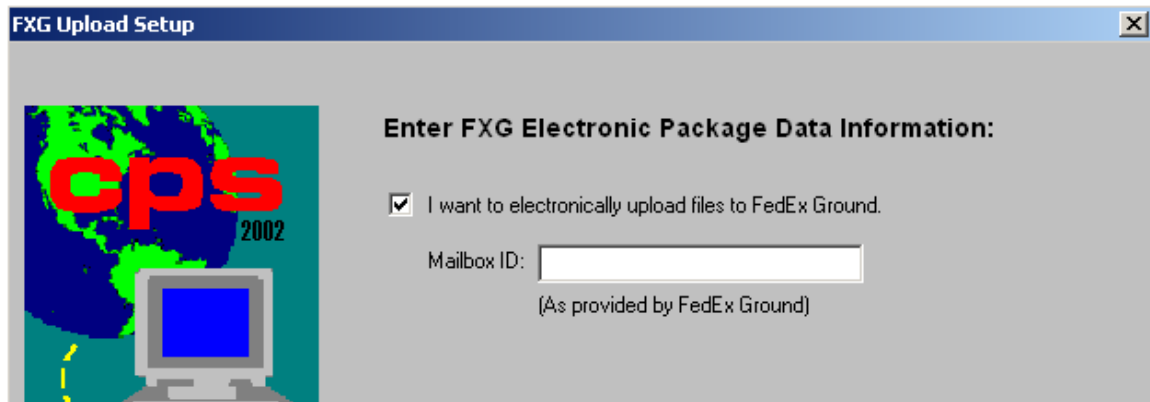
Runs the first custom report group 34/44 NUM 02/20/2001 03:59 PM

## Using EPDI to Upload Electronically

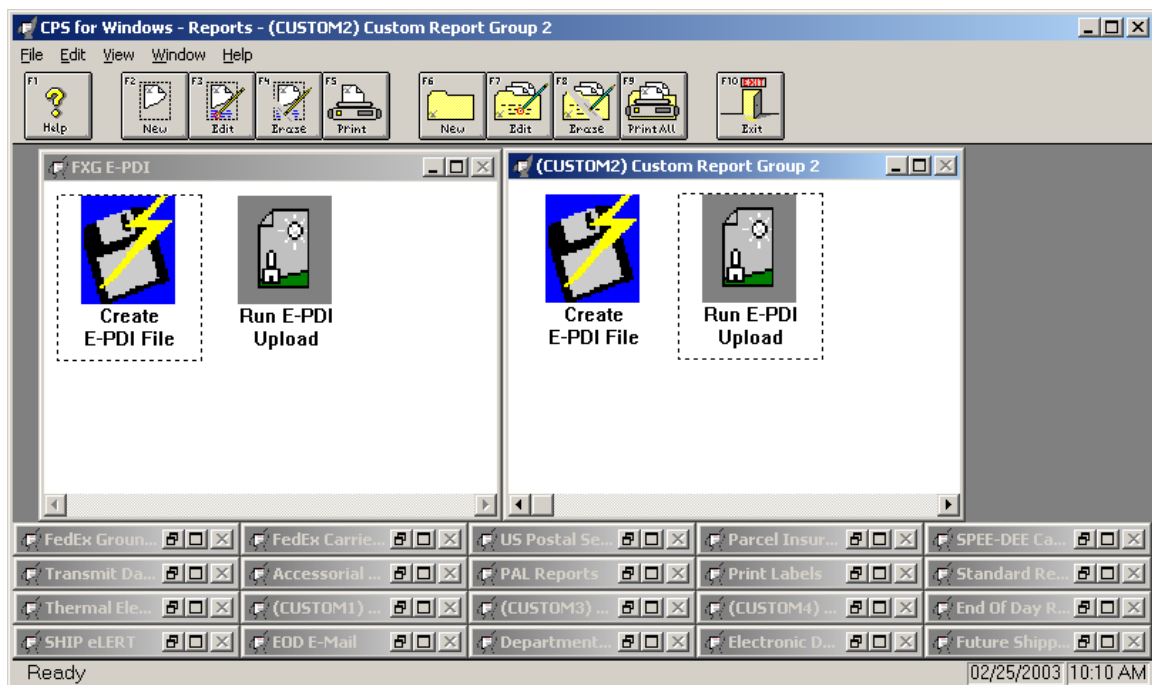
FedEx Grounds' Electronic Package Data Information (E-PDI) allows you to upload directly to the Fed Ex server. *To use this option, you must first obtain a 9-digit FXG mailbox id from your FedEx Ground account representative.*

### EPDI Set up

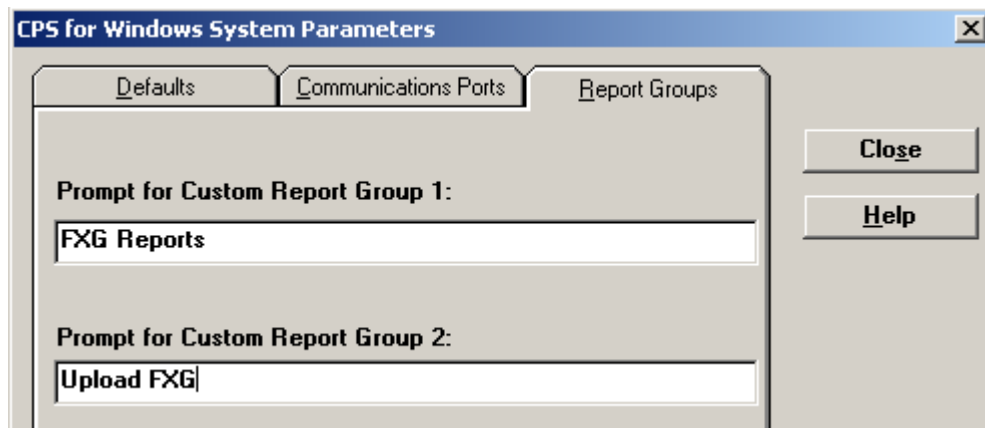
1. Click Start → Programs → CPS for Windows → Setup CPS. Click “next” until you see the carrier list. FXG must be selected as one of your carriers. Click “next” until you reach the FXG Electronic Package Data Information window below. Check the box next to “I want to electronically upload files to FedEx Ground” and input your mailbox ID. Click “next” until you reach the final setup window. Click “Finish”, and then click “OK” to the recommission message.



2. To set up the FXG upload in the Custom Report Group 2 folder, click on Start → Programs → CPS for Windows → Reports.
3. Open the “FXG E-PDI” folder by restoring it from its minimized state.
4. Also open the “Custom Report Group 2” folder and resize it so you can see both windows.
5. Click on the “Create E-PDI File” icon to select it. Click again and hold the left mouse button down as you drag it to the “Custom Report Group 2” window. When you release the mouse button, you will have a copy of the report in the Custom Report Group folder.
6. Use the same method to move a copy of the “Run E-PDI Upload” icon to the “Custom Report Group 2” window. Be sure you place this icon to the right of the “Create E-PDI File” icon.



To rename this option on the process menu, select Start → Programs → CPS for Windows → Tools. Click the “system” button, and then click the “report groups” tab. Change the prompt for custom report group 2 to “FXG upload” or whatever you choose. Click Close, and then click Exit.



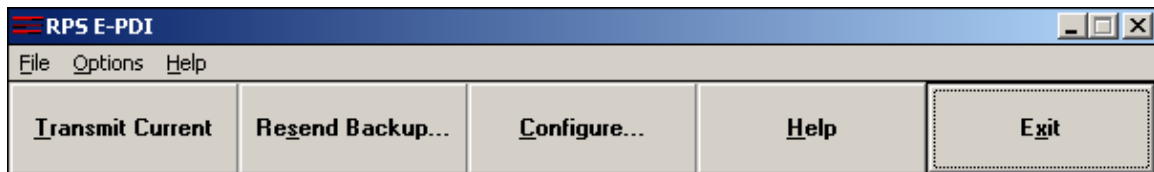
### How to Upload the FXG file

When there are FXG shipments to upload, select the option from the Process menu. Be sure you have first printed your FXG report(s). You must select these options BEFORE you do the Reconcile and Move to History steps.

Note: As of 2-24-03, call tag information is not uploaded electronically.

### Additional E-PDI options

Additional options for setup and resending files can be found by choosing Start → Programs → CPS for Windows → FXG E-PDI.



# FedEx AIR

The information below pertains to normal FEX setup, without the optional FedEx Server. If your system is equipped with the optional FedEx Server, which requires an Internet connection, the airbill number will be automatically assigned and bar-coded labels will print. FedEx Server setup is done by Plantrol and Harvey technical support.

## SELECTING FEDEX SERVICE LEVELS

FedEx offers a variety of Service Levels. These can be viewed by selecting FEX as the carrier, and then clicking on the down arrow next to the Service Level window. The Service Level window is shown below.

The screenshot displays the 'BELKNAP OMNI SHIP' application window. The 'Shipment Entry' tab is active, showing fields for Shipment Number (106176), Carrier (FEX), Service Level (Standard Overnight), Kind, and Shipper ID (1234567). A dropdown menu is open for the Service Level field, listing options: Standard Overnight, Priority Overnight, First Overnight, 2 Day Service, and Express Saver Service. An arrow points from a text box to this dropdown menu.

Service Levels available

The interface also includes fields for Ship To (Customer or Warehouse), Bill To, and various address and contact information. The bottom section contains a table for Miscellaneous items and a summary of shipping charges and weights.

## SELECTING FEDEX BILLING OPTIONS

Select the billing option from the Billing Options window. If you select to bill receiver, third party, or credit card, additional input is necessary as shown. The charges will be calculated and displayed, even though the bill may be sent to another party. The billing options window is shown below.

For credit card billing, the card number and expiration date are required.

Choose the  
billing option  
here.

**BELKNAP OMNI SHIP**

File Edit User Inquiries Reports Tools Window

Find(F1) Next(F2) Change(F3) Add(F4) Delete(F8) Save(F9) Cancel(F11) Exit(F10)

---

**Shipment Entry**

**OMNIShip**

Shipment | Items | Harvey

Shipment Number Order Number **106176**

Carrier **FEX** Service Level **Standard Overnight** Kind **[Blank]** Shipper ID **1234567** Process Shipment

---

**Credit Card**

Card # **425113259999**

Expiration Date (YYMM) **0312**

Print Options:

- ☒ Thermal Address Label [Print]
- ☐ Std/GPO Labels
- ☐ Distributor Labels
- ☒ Packing List / BOL

Shipped By: **AAPLA**

Inside Delivery ☐

Shipping Instructions

☐ Print on Packing List

---

Misc.

* Miscellaneous *					
Line Item	Quantity Ordered	Quantity Shipped	Package Merchandise Desc.	Package Merchandise Desc.	Item Number
* Miscellaneous *	1	1000	MERCHANDISE		

Shipment ☐ Partial

Sched. Ship Date

Total Weight  Shipping Charges

Remove from Shipment Add Release **Add Order**

Total Weight **15** Cartons Shipped **1** Shipping Charges

Change Mode

Packages for: MERCHANDISE

Package Type	# of Ctns	Carton Weight	Qty per Carton
Letter	1	1	1

Start W I S Section 6.3 F Shipping - Mi BELKNAP ... CPS for Wind. 1.44 PM

## FEDEx AIR BILLS, LABELS, AND REPORTS

**Fill out the FedEx Air Bills manually.** (If you wish to have a devoted impact printer set up to print the air bills automatically, contact Plantrol.) **The Air Bill number is a required field when entering a FedEx shipment.** If you forget to input it, you will get a reminder before the shipment is processed. You can track FedEx shipments (or any Harvey carrier) using OmniShip and an Internet connection – see section 12 “Tracking”.

**Printing FedEx bar-coded labels requires the optional FedEx server configuration.** Without the FedEx server, if you would still like a thermal address label to print, check “thermal labels” under the print options.

**Reports of FedEx information are available in the Harvey CPS system.** For information, click Start → Programs → CPS for Windows → CPS Online Help. In the contents, select CPS Reports → Reports Group Descriptions → Carrier Groups → FedEx Carrier Group. More information on CPS reports can be found in Section 9.13 “Harvey Reports”.

Be sure to input the Air Bill tracking number.

The screenshot shows the 'BELKNAP OMNI SHIP' application window. The 'Shipment Entry' form is active, displaying various fields for shipment details. A callout box labeled 'Air Bill tracking Number' points to the 'Air Bill / Pro Number' field, which contains the value '92226162440'. The form also includes sections for '3rd Party Billing', 'Print Options', and a table for 'Cartons for: STUFF TO SHIP'.

Line Item	Quantity Ordered	Quantity Shipped	Package Merchandise Desc.	Package Merchandise Desc.	Item Number
1	2000		STUFF TO SHIP		

Package Type	# of Ctns	Carton Weight	Qty per Carton
Single	2	15	1000

## USING OPTIONAL FEDEX SERVICES

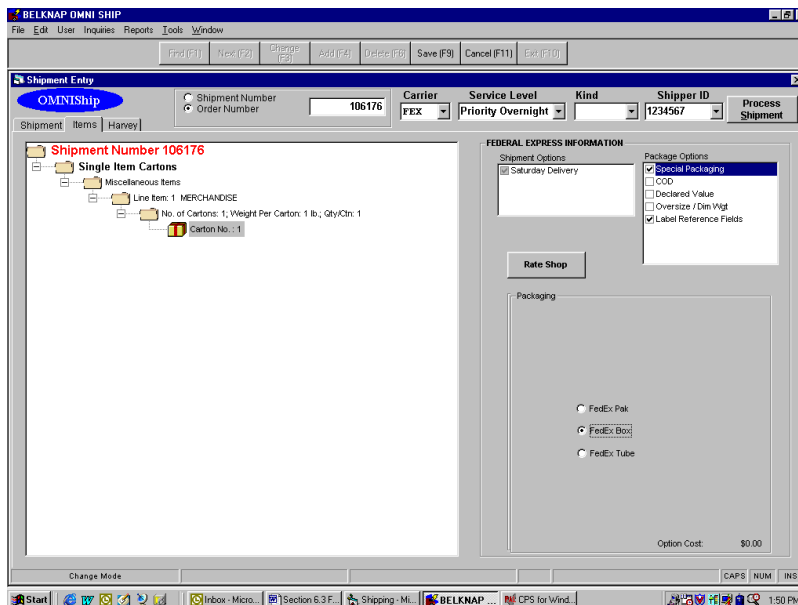
FedEx optional services can be accessed from the ITEMS tab, after entering the package information on the SHIPMENT tab. Some services are only offered in combination with certain Service Levels.

### Saturday Delivery

1. Enter the shipment as normal, but do not click the PROCESS SHIPMENT button.
2. Click the ITEMS tab (shown below).
3. Click off and then back on the Shipment Number to enable the shipment options.
4. Use the mouse to check the box next Saturday delivery.

### Special packaging (FedEx Pak, Box, or Tube), COD, Declared Value, or Oversize

1. Enter the shipment as normal, but do not click the PROCESS SHIPMENT button.
2. Click the ITEMS tab (shown below).
3. Click to select the first carton. (The option will be added to all cartons in the shipment.)
4. Use the mouse to check the box next to the option you wish to add.
5. Complete any additional fields that display when you select the option.
6. If more services are to be added, repeat steps 5 and 6 to select them.
7. Click the PROCESS SHIPMENT button.





## **FEDEx SHIP MANAGER OPTION**

The FedEx Ship Manager is an optional feature of Plantrol's OmniShip shipping system. The Ship Manager enhances the capabilities for FedEx Air shipments.

### **Benefits**

Without the FedEx Ship Manager installed, users must prepare an air bill document, and then input the air bill number. The benefits of the Ship Manager software over the standard functionality in CPS include automatic assigning of air bill numbers, printing barcode address labels, and electronic uploading of the shipment information.

### **How it works**

The FedEx Ship Manager software is server software used specifically for FedEx Air shipments. Additional workstations can be networked to the server, but each shipment interacts with the server to get rating and other information. This is different from the Harvey software where rates are resident in each PC. The FedEx Ship Manager was created by FedEx and works together with CPS. It can be installed on any CPS workstation, and does not necessarily have to be installed on the master PC in a multi-PC setup.

The software interacts with FedEx over the Internet on each shipment, and routinely polls the PC to retrieve current shipment information. An additional end of day step transfers the day's shipments to FedEx.

### **System Requirements**

A Windows 2000 or NT operating system is required. Harvey technicians do the setup at their site. There is a charge for setup and also an increased support cost. After the initial setup for a site, additional PC's may be setup from an installation CD. Specific PC requirements follow. USQL license and other requirements for any Plantrol visual system also apply.

- Must have a Fresh installation of Windows 2000, either from original PC purchase or re-installation
- Processor - Pentium with minimum 350 MHz
- Memory – 128 MB or higher
- Hard Drive – Minimum of 4.2 GB of free space.
- Monitor – SVGA Video, 1024x768 with high color
- Modem – 56K v.90 minimum
- Dial-Up Networking and TCP/IP installed
- Dial-Up Adapter installed

- CD-ROM Drive
- 3.5-inch floppy drive
- Mouse
- Microsoft Internet Explorer v6.0 or greater
- ODBC users must have MDAC v2.5 or higher
- PC Anywhere v10.0 or higher
- Appropriate scales and printers for reports and labels

## Using the FedEx Ship Manager

Under File → Set up Options → Omniship options and settings, two check boxes must be marked as shown below.

For FedEx Ship Manager, check these two boxes.

All shipments made with the FedEx Ship Manager require a recipient phone number. At end of day, choose the Fed Ex step from the Process Menu.

# US POSTAL SERVICE

---

## SETTING UP USP AS A CARRIER

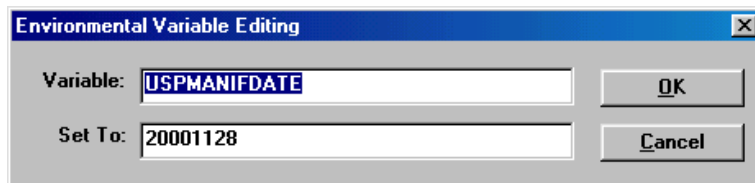
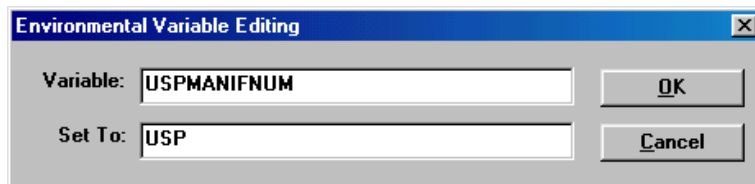
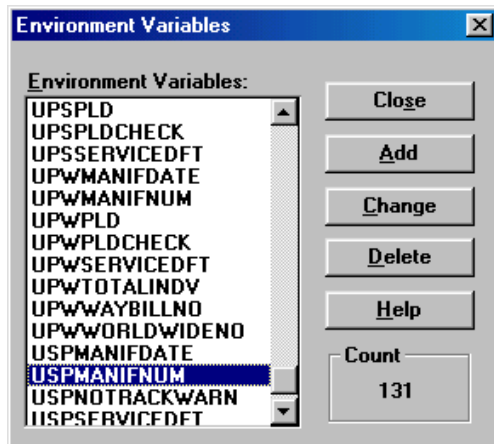
There are three set-up tasks that need to be completed prior to using USP.

1. Add the USP carrier to Autotext.

To add USP as a carrier, refer to section 13.1 (How to Add or Delete a Carrier) in your OmniShip manual. If you are currently using USP as one of your carrier codes, you will need to change this prior to using USP as the US Postal Service carrier.

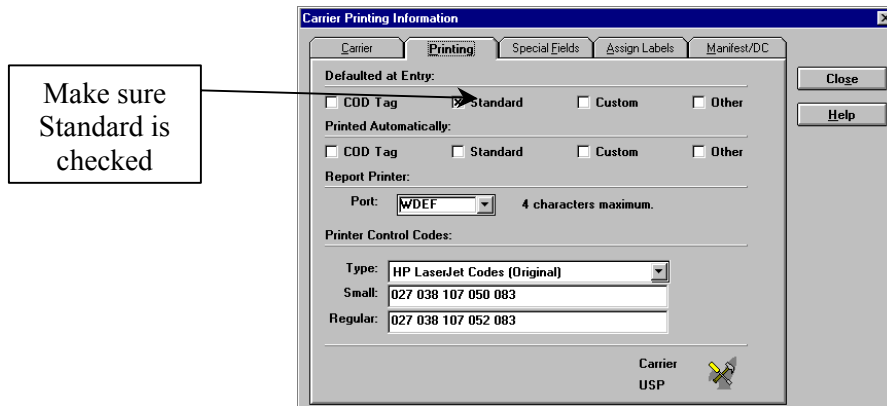
2. Set Environmental Variables:

Go to Start → Programs → CPS for Windows → Tools → Setup → Environmental Variables. Check to see if USPMANIFNUM and USPMANIFDATE are listed. If these variables do not already exist (not visible in the list) press ADD to add USPMANIFNUM, and set the value to USP. Also add USPMANIFDATE and set the value to the current date, in the format shown on the screens pictured below:

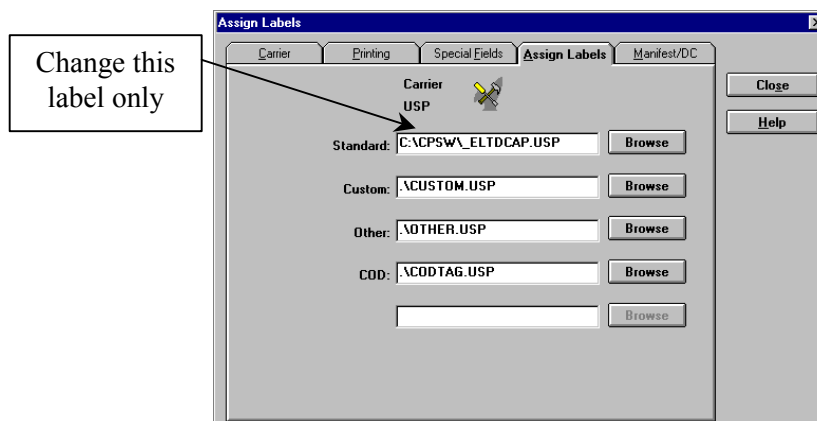


### 3. Assign Standard USP Label:

Go to Start → Programs → CPS for Windows → Tools → Setup → Carrier Parameters.  
Chose USP as the carrier and click the Printing tab:

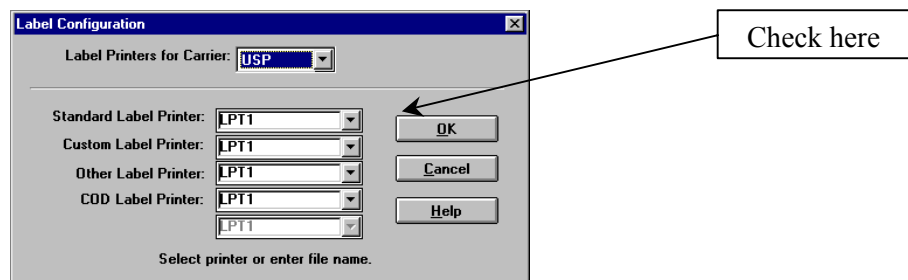


Next, click the Assign Labels tab:



Change the Standard label to \_ELTDCAP.USD. This label file can be found in the: C:\CPSW directory. Click the Close button. The others are standard and do not need to be changed.

Next, go to Setup -- Change Label Printers (in CPS Tools):



Make sure the Standard Label Printer is set to LPT1 and click OK. Close the CPS Tools program.

## SELECTING USP SERVICE LEVELS

The US Postal Service offers a variety of Service Levels:

These can be viewed by selecting USP as the carrier, and then clicking on the down arrow next to the Service Level window. The Service Level window is shown below.

Service levels available for USP

“Bill Shipper” is assumed as the billing option for the USP carrier.

## USING OPTIONAL USP SERVICES

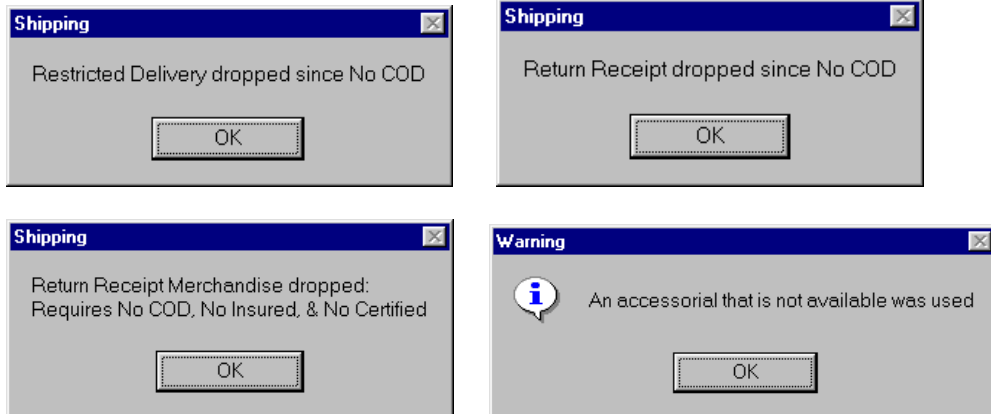
USP optional services can be accessed from the ITEMS tab, after entering the package information on the SHIPMENT tab. Some services are only offered in combination with certain Service Levels. Make sure you choose USP for Carrier and the appropriate Service Level BEFORE attempting to add optional services.

Shipment Options are applied to the entire shipment, while Package Options are applied to the individual packages. The following options are available for shipments and packages:

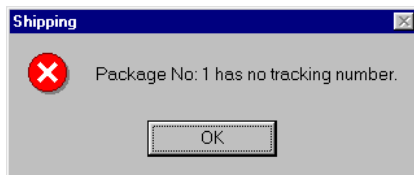
Option	Shipment or Package?	Service Level
Restricted Delivery	Shipment	Priority & Parcel Post
Certified Mail	Shipment	Priority
Special Handling	Shipment	Parcel Post
COD	Package	All
Insured Value	Package	All
Return Receipt	Package	All

Some options require additional fields to be completed. Some combinations of options are not allowed. For more information on Service Levels and Options, visit: <http://www.usps.com>

**Warning:** If you get any of the messages shown below (or similar messages), you've selected an option or combination of options that are not allowed by the carrier. The message will indicate which option is not allowed. The option is dropped in Harvey. The shipment should be voided and re-entered.



Disregard the following error message if you receive it. Tracking numbers are not required for USP shipments:



**To apply options to your shipment or package:**

1. Enter the shipment as normal and select USP for Carrier and desired Service Level, but DO NOT click the Process Shipment button.
2. Click the ITEMS tab (shown above).
3. By default, the Shipment is selected. Use the mouse to check the box next to the Shipping Option(s) you wish to add.
4. Complete any additional fields that display when you select the Shipping Option.
5. Click to select the first carton. (The option will be added to all cartons in the shipment.)
6. Use the mouse to check the box next to the Package Option you wish to add.
7. Complete any additional fields that display when you select the Package Option.
8. If more services are to be added, repeat steps 5 and 6 to select them.
9. Click the PROCESS SHIPMENT button.

The screenshot displays the 'Shipment Entry' window with the 'ITEMS' tab selected. The window is titled 'Shipment Entry' and features a blue header bar with the 'OMNISHIP' logo. Below the header, there are fields for 'Shipment Number' (106241), 'Carrier' (USP), 'Service Level' (Priority), 'Kind', and 'Shipper ID'. A 'Process Shipment' button is located on the right. The main area is divided into two panes. The left pane, labeled 'Items Tab', shows a tree view of 'Shipment Number 106241' with a single item carton. The right pane, labeled 'USPS INFORMATION', contains two sections: 'Shipment Options' with checkboxes for 'Restricted Delivery' and 'Certified Mail', and 'Package Options' with checkboxes for 'COD', 'Insured Value', and 'Return Receipt'. A 'Rate Shop' button is also present. At the bottom, there is a 'Return Receipt' section with radio buttons for 'Return Receipt' and 'Return Receipt - Merchandise'. The status bar at the bottom shows 'Viewing', '3/29/00 4:49:02 PM', '3/29/00 4:49:04 PM', 'aapla', 'Record: 4429', and 'CAPS NUM INS'.

Items Tab

Shipment Options

Package Options

# SPEE DEE DELIVERY

## SETTING UP SPEEDEE AS A CARRIER

There are two set-up tasks that need to be completed prior to using SPEE DEE.

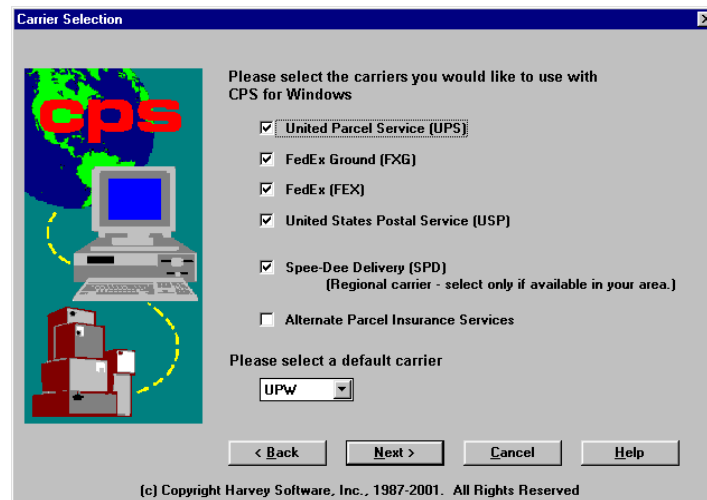
### 1. Add the SPEE DEE carrier to Auto text.

To add SPEE DEE as a carrier, refer to section 13.1 (How to Add or Delete a Carrier) in your OmniShip manual. You must use SPD as the Carrier Code

### 2. Setup CPS

Start → Programs → CPS for Window → Setup CPS

1. Next through the Setup until you get to the following screen
2. Check the Spee Dee Delivery box. Make No other changes.

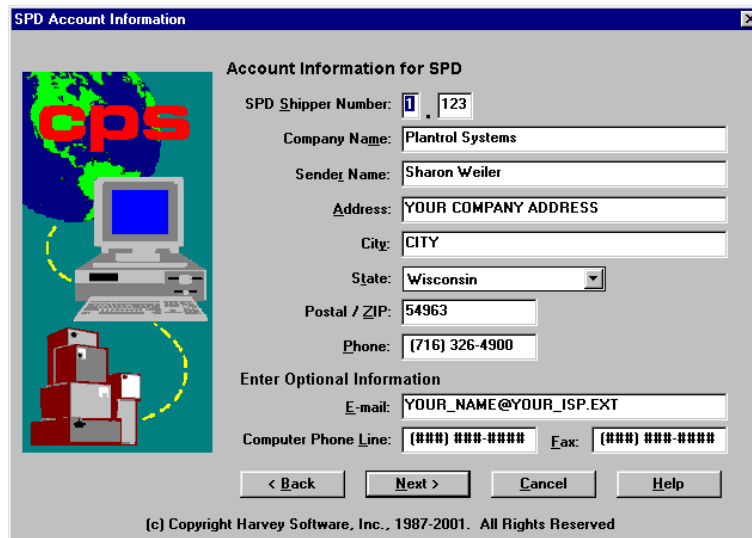


3. Next Through the Setup again until you reach Set up for Spee Dee.





4. Enter Your Company Information, and Click Next

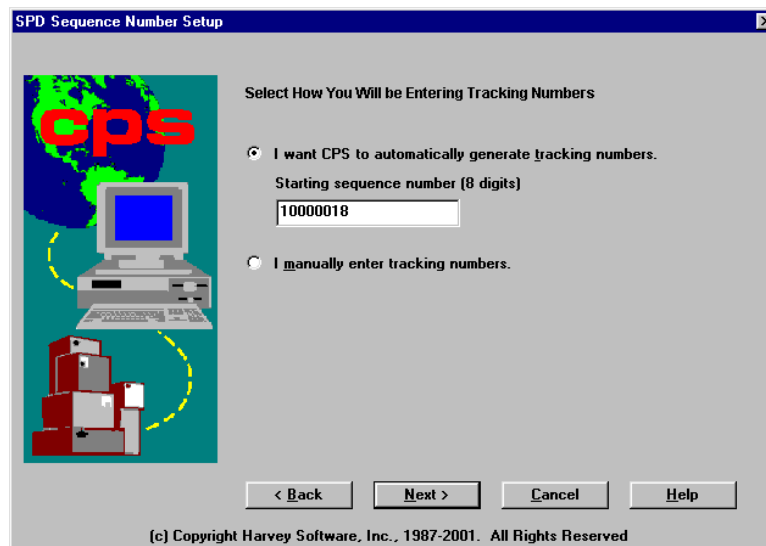


The dialog box is titled "SPD Account Information". On the left is a logo with "cps" in red over a globe, with a computer and boxes below it. The main area is titled "Account Information for SPD" and contains the following fields:

- SPD Shipper Number: 123
- Company Name: Plantrol Systems
- Sender Name: Sharon Weiler
- Address: YOUR COMPANY ADDRESS
- City: CITY
- State: Wisconsin (dropdown menu)
- Postal / ZIP: 54963
- Phone: (716) 326-4900
- Enter Optional Information:
  - E-mail: YOUR\_NAME@YOUR\_ISP.EXT
  - Computer Phone Line: (###) ###-####
  - Fax: (###) ###-####

At the bottom are buttons: < Back, Next >, Cancel, and Help. The footer text is "(c) Copyright Harvey Software, Inc., 1987-2001. All Rights Reserved".

5. Choose I want CPS to automatically generate tracking Numbers, and Click Next

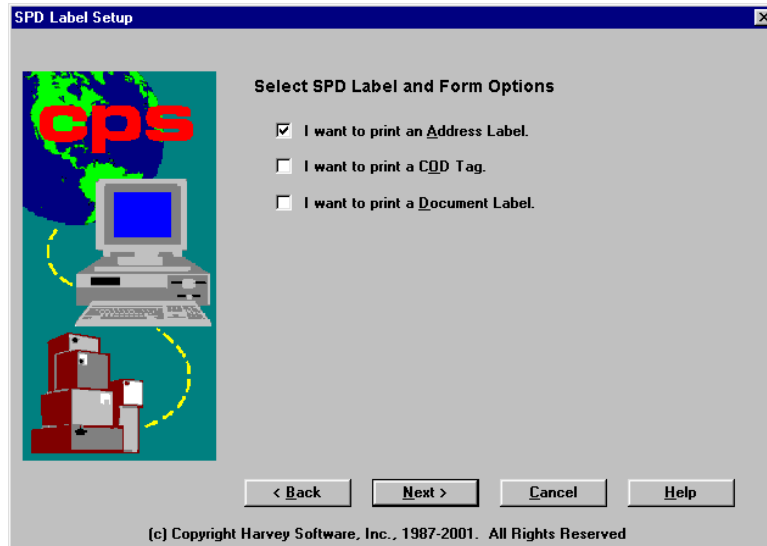


The dialog box is titled "SPD Sequence Number Setup". On the left is the same "cps" logo as the previous dialog. The main area is titled "Select How You Will be Entering Tracking Numbers" and contains the following options:

- ☒ I want CPS to automatically generate tracking numbers.
  - Starting sequence number (8 digits): 10000018
- ☐ I manually enter tracking numbers.

At the bottom are buttons: < Back, Next >, Cancel, and Help. The footer text is "(c) Copyright Harvey Software, Inc., 1987-2001. All Rights Reserved".

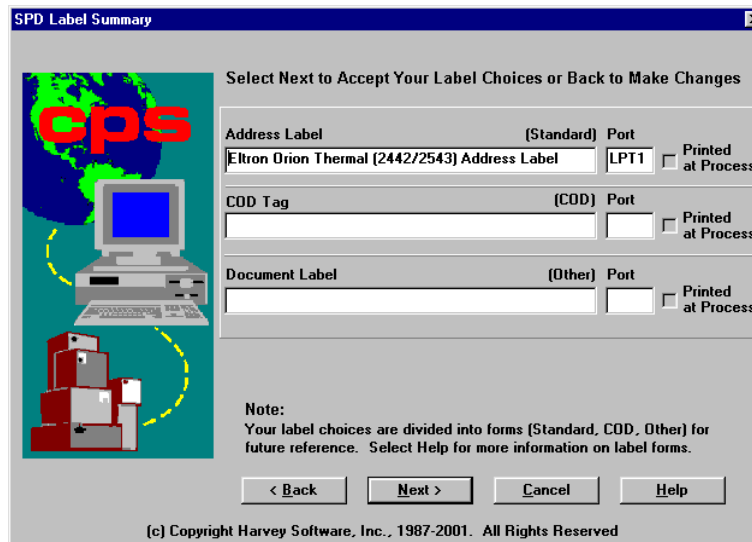
6. Choose I want to print Address Label, and Click Next.



7. Select the label description shown and Choose LPT1 for the printer port to print address labels, and click next.



8. Double Check to make sure the selections are correct, and click next.



The SPD Label Summary dialog box features a graphic on the left showing a computer monitor, keyboard, and a stack of boxes with the 'cps' logo. The main area contains three sections for label configuration:

Label Type	Form	Port	Printed at Process
Address Label	(Standard)	LPT1	<input type="checkbox"/>
COD Tag	(COD)		<input type="checkbox"/>
Document Label	(Other)		<input type="checkbox"/>

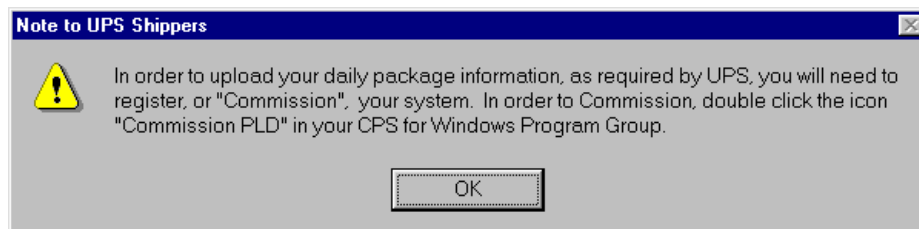
Below these sections is a 'Note' explaining that label choices are divided into forms (Standard, COD, Other) for future reference. At the bottom are buttons for '< Back', 'Next >', 'Cancel', and 'Help'. The footer reads: '(c) Copyright Harvey Software, Inc., 1987-2001. All Rights Reserved'.

9. Click Finish to finish the setup



The Complete Setup dialog box features the same 'cps' graphic as the previous window. It displays a 'Congratulations!' message and instructions on how to begin processing parcels. A 'Note' section provides guidance on reviewing settings or exiting the setup. At the bottom are buttons for '< Back', 'Finish >', 'Cancel', and 'Help'. The footer reads: '(c) Copyright Harvey Software, Inc., 1987-2001. All Rights Reserved'.

10. This message will appear if everything was successful. Click OK.



The Note to UPS Shippers dialog box has a yellow warning icon on the left. The text informs users that to upload daily package information as required by UPS, they need to register or 'Commission' their system. It instructs them to double-click the 'Commission PLD' icon in the CPS for Windows Program Group. An 'OK' button is centered at the bottom.

## **OPTIONAL SPEEDEE SERVICES**

Spee Dee optional services can be accessed from the ITEMS tab, after entering the package information on the SHIPMENT tab.

There are two types of optional services, those that must be applied to the entire SHIPMENT, and those that must be applied to each PACKAGE individually. The two types are grouped in boxes at the right of the screen. The shipment detail is shown graphically at the left using a tree control. The process to apply each type of service is outlined below.

### **Shipment Options – Call Tags**

Call tags are a Shipment Option. Follow the instructions below. Call tags must be entered as miscellaneous shipments.

1. Click MISCELLANEOUS on the orders tab. (A shipment number is assigned.)
2. Input the address where the carton is to be picked up in the “Ship To” address.
3. Click the “Ship From” tab and input the address to where the carton should be returned. (This may be your distributor’s name and your address.)
4. Select Carrier and Service level.
5. Select payment terms.
6. Enter your initials.
7. Enter the package Merchandise Description. Include the job number or other reference information. This will print on the Omniship report.
8. Enter package information – number of packages, weight, and quantity per package.
9. Click the ITEMS tab.
10. Click on the Shipment Number to enable the shipment option.
11. Click Call Tag under the shipment options to check the box
12. Click the PROCESS SHIPMENT button.
13. A label will be generated for your records. Mark it “Call Tag” to identify it.

## PACKAGE OPTIONS

These currently include **COD, Declared Value, HAZMAT, Delivery Confirmation, Oversized/Dimensional Weight, and Label Reference Fields**. Listed below is the procedure to add package options to your shipment.

### HOW TO USE PACKAGE OPTIONS

1. Enter the shipment as normal, but do not click the PROCESS SHIPMENT button.
2. Click the ITEMS tab.
3. Click the + symbols to display all cartons.
4. Click the carton to receive the additional service.

You can select multiple cartons by clicking the first one, then holding the Ctrl key down while you click the others.

5. Use the mouse to check the box next to the option you want to add.
6. Complete any additional fields that display when you select the option.
7. Repeat steps 4 to 6 for additional cartons and / or services.
8. Click the PROCESS SHIPMENT button.

The selected (highlighted) carton will be sent COD with Additional Handling. The COD amount is \$253.25, to be received in cash.

The screenshot shows the 'Printco Incorporated - Shipping' application window. The 'SHIPMENT ENTRY' dialog is open, with the 'ITEMS' tab selected. The 'SHIPMENT' section shows 'OMNISHIP' as the carrier and '112190' as the Shipment Number. The 'ITEMS' tree view shows 'Single Item Cartons' with 'Carton No. 1' selected. The 'FXG INFORMATION' panel on the right has 'Package Options' checked, with 'COD' selected. The 'COD' section shows an 'Amount' of \$253.25 and 'PAYMENT METHOD' set to 'CASH'. The 'Option Cost' is 0.00.

## SPEE DEE END OF DAY REPORTS

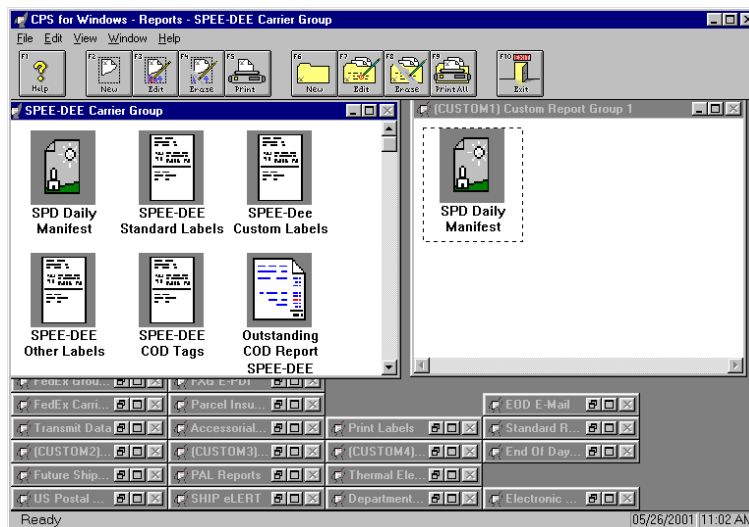
Spee Dee shipment records will not move from the CPS daily file to the CPS history file until after they have been printed on a Spee Dee Daily Manifest report. Section 6.531 provides instructions to set up this report in the “Custom Report Group 1”. Section 6.532 indicates when and how to print this report.

### Initial Setup of Spee Dee Reports

To set up the Spee Dee Daily Manifest in the Custom Report Group 1 folder, click on Start → Programs → CPS for Windows → Reports.

1. Open the “Spee Dee Carrier Group” folder by restoring it from its minimized state.
2. Also open the “Custom Report Group 1” folder and resize it so you can see both windows.
3. Click on the “SPEE DEE Daily Manifest” icon to select it. Click again and hold the left mouse button down as you drag it to the “Custom Report Group 1” window. When you release the mouse button, you will have a copy of the report in the Custom Report Group folder.
4. If you wish, you can drag other reports into this folder. Close the reports window.
5. When you select “Custom Report Group 1” from the CPS process menu, the SPEE DEE Daily Manifest will be printed.

Note: You may wish to rename “Custom Report Group 1” to “Spee Dee Manifest”. You can do this by selecting Start → Programs → CPS for Windows → Tools. Click the System button, and then select Report Groups.



## Printing the Spee Dee Manifest

If you have Spee Dee shipments in your shipping day, click “Custom Report Group 1” to print this report BEFORE you do the “Move to History” step.

The screenshot shows the 'Computerized Parcel System for Windows' interface. The main window has a menu bar (File, Edit, Process, Help, Support) and a toolbar with icons for Help, Transmit Data, End Of Day Reports, Move to History, Labels, Delete, Totals, Print Totals, Zero, Add, Save, and Tracking. A sidebar on the left contains a menu with 'Custom Report Group 1' selected. The main area is titled 'Find Parcels' and contains several input fields and a summary section.

**Find Parcels**

Department:  Customer ID:

Name:  to person

Attention:

Address:  address

Secondary:

City:  the city State:  Postal Code:

County:  ALBANIA Phone:

Service:  UPW: Worldwide Express (907)

Tracking #:  1Z1237216610009926

Actual Wt (lbs.):  15.000

Bill Weight:  15.0

Dim Weight:  0.000

Total:  \$260.47

Use ☐ COD ☐ Standard ☐ Custom ☐ Other

Printed ☐ COD ☐ Standard ☐ Custom ☐ Other

Pcs: 18 Wt: 373.0 ActWt: 373.000 Charges: 3601.96 Costs: 3601.96

Runs the first custom report group 34/44 NUM 02/20/2001 03:59 PM

## INTERNATIONAL SHIPMENTS

---

Government regulations require export documentation for most international shipments. OmniShip works with Harvey to process international shipments for UPS, including the creation of the required documentation. Export documents, called *Commercial Invoices*, are required for all international shipments, excluding the shipment of documents. International shipments require three hard copies of the commercial invoice for each shipment. OmniShip facilitates the preparation of these documents to properly declare your shipment in both the country of export and the country of import.

The purpose of the commercial invoice is to provide additional information pertaining to the value of shipped items for customs. Items required on the commercial invoice include:

Name, address, contact person and phone number of shipper.

Recipient's name, address (including destination country and postal code, if required), contact person, and telephone number.

Name and address of purchaser, if different from recipient.

Country of origin (where it is manufactured).

Invoice date

Purchase Order number or invoice number, if applicable.

Complete description of each item shipped, including composition and use.

Number of units, unit value, total value of each item. For samples of articles or articles of no commercial value, a value must be estimated and disclosed.

Transportation charges and insurance.

Number of packages and total weight.

Total value of the shipment.

Reason for export (sale, repair, etc.).

Shipper's signature and date.

**Here are the main steps required to process an international order:**

1. Set up international shipping defaults.
2. Create and process the shipment using UPW as the carrier.
3. Enter the worldwide information.
4. Enter the commercial invoice information.
5. Add information about package weights.
6. Process the UPW shipment. Labels and the commercial invoices will print.



## SET UP THE DEFAULTS

When processing an international shipment using OmniShip, the UPW (United Parcel Service Worldwide) carrier is used. Before you process an international shipment, you first need to set up some defaults for this carrier using Harvey's Computerized Parcel System (CPS) program on each PC that will process international shipments. Defaults that need to be set up include Product Information, Shipping Labels and Commercial Invoice Copies. OmniShip must be closed prior to changing information in CPS. Some questions you need to answer before setting up the defaults include:

What products do you ship internationally?

Do the products you ship internationally require the use of commodity codes, ECCN and a license number?

What is the value of the products you ship internationally?

Which UPS international shipping/billing terms best suit your company's needs?

Do you have products listed in a database?

How many copies of the commercial invoice do you want to print?

What other countries do you ship to? Are the states for these countries required for UPS shipping and are they in your system?

### Add the UPW carrier to Auto text.

Check the SVIA\$ variable to make sure the UPW has been added. To add UPW as a carrier, refer to section 13.1 (How to Add or Delete a Carrier) in your OmniShip manual:

Develop - U/Gi Universal Graphical Interface

File Edit Preferences View Transfer Help

AUTOMATIC TEXT FILE MAINTENANCE

Variable Name: **SVIA\$**

Alpha Flag: (NL If None) **UPW**

Text	1	2	3	4	5	6	7	8
1234567890123456789012345678901234567890123456789012345678901234567890								
UPS International								

Numeric Value 1: \_\_\_\_\_

Numeric Value 2: \_\_\_\_\_

Numeric Value 3: \_\_\_\_\_

Numeric Value 4: \_\_\_\_\_

Cre: 7-19-99 09:51:42 Mod: 12-18-00 19:01:56 JANET [ ] Rec #: 69 004

Connected to 12.0.1702 5.26 18:57:27

## Product Information

The Product Information defaults set here contain the information about what types of commodities you are exporting. This information is stored and can be used repeatedly to make processing your commercial invoices more efficient. Products are entered by number. This can correspond to product number schema's you use at your company, but it doesn't have to.

Defaults for Product Information are set up using the CPS Tools program. To launch the tools program: Start→Programs→CPS→Tools

The CPS Tools window displays:



To add or edit product information:  
Open **Edit →Product...**

The Product Editor displays:

Click the Add button, enter a number and click OK and then complete the applicable fields for each product type that you ship.

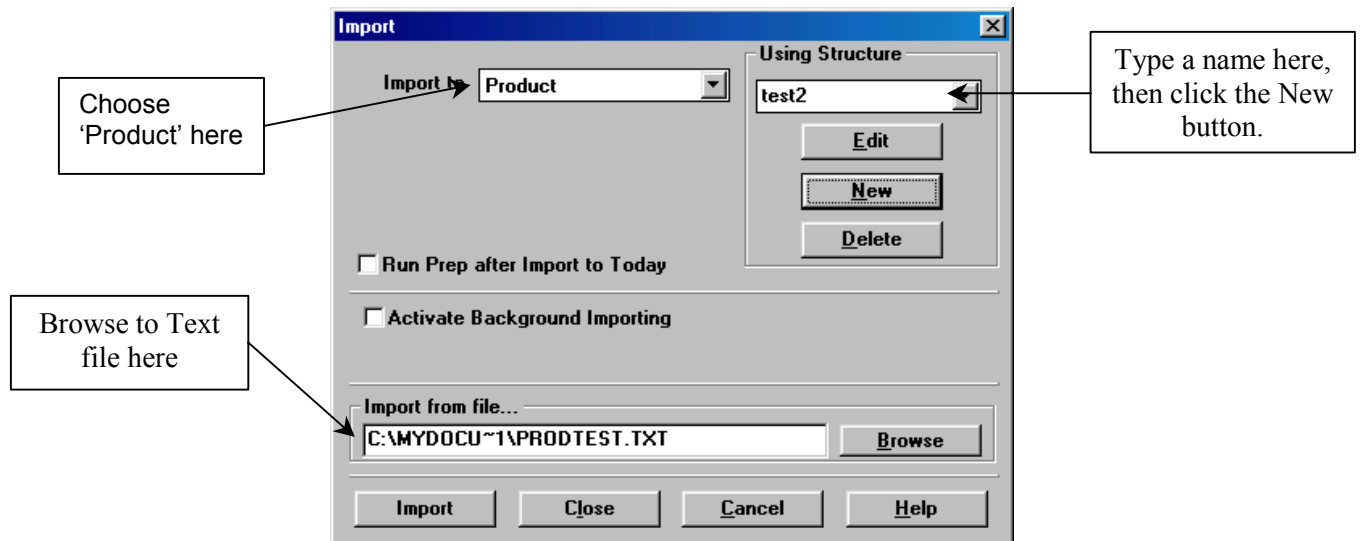
Since you are setting up defaults here, the only required field is Product Number. However, when you add product to your commercial invoice during shipment processing, the Description, Origin Country, and Unit Value (usually cartons) will be required. Please note that the Origin Country is specific to where the product originated, not where you are shipping it from.

The Commodity Code, ECCN (Export Control Classification Number) and License Number (used for validated licenses) fields relate to controlled commodities and are not required by the system. You can also add NAFTA Certificate of Origin information specific to the product here.

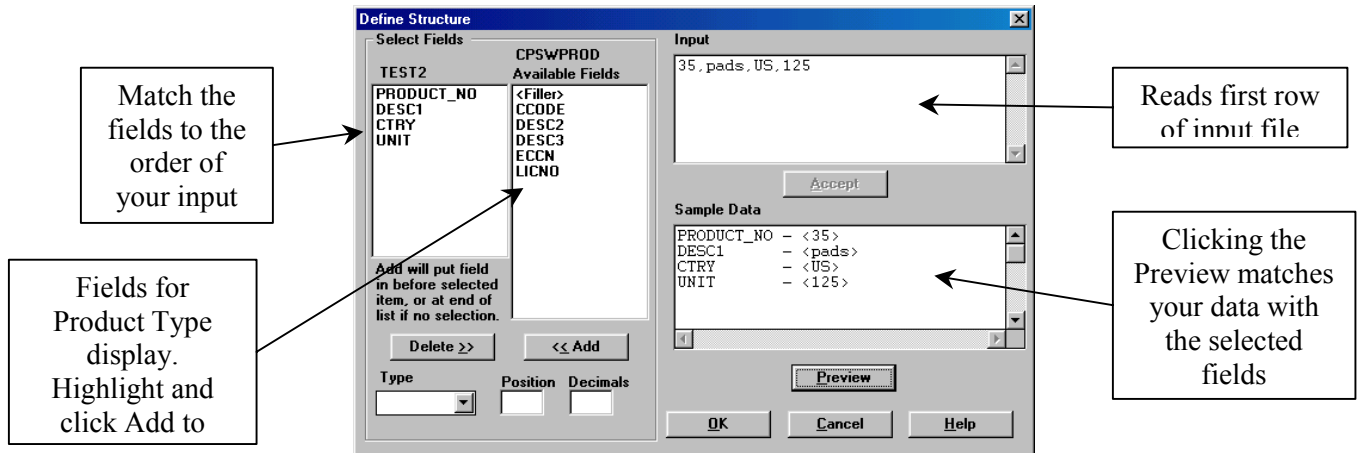
## Data Imports

If you already have products set up using another system, you can import the information into Harvey. You must export the product information from the other system into a TXT file (comma delimited), DAT file, DIF file or a WKS file. There should not be a header row in this file. Here is an overview of the process:

1. Go to Start→Programs→CPS for Windows→Tools
2. Click on the Import menu
3. Choose Product in the Import To list:



4. Use the Browse button to navigate to your data file.
5. Select a Data Structure. Or, if it's the first time, enter a name in the Using Structure field and click the New button:



- Choose the fields to include in your data structure by selecting them and clicking the Add button. The selected fields list should match the order of data from your Input file. Click the Preview button to make sure your data ends up in the correct fields. Click OK.
- Determine if you need to select the Prep and Background Importing options. For more information, click the Help button on the Import window.
- Click the Import button. Product codes are created from your input file.
- 

## Shipping Labels

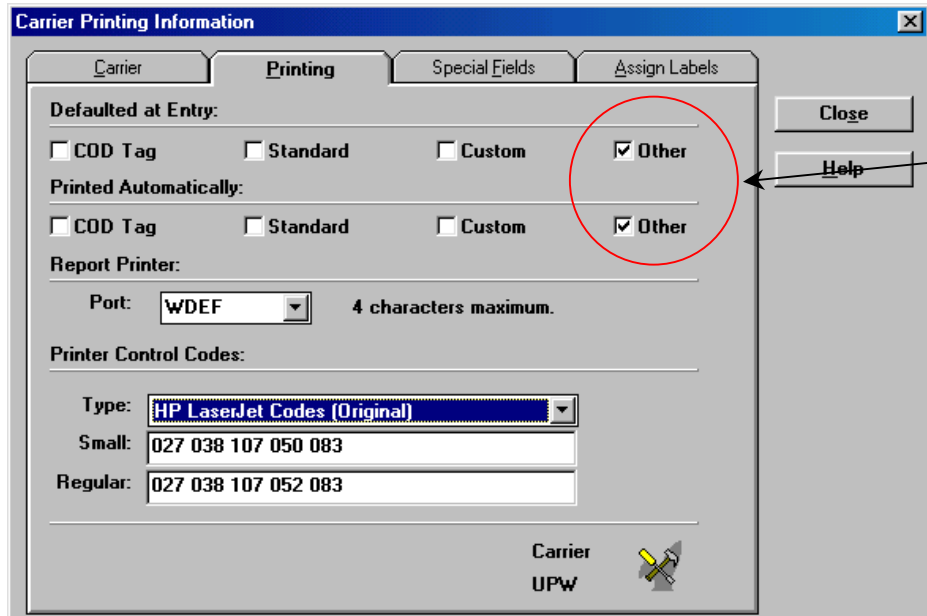
The Shipping Labels are also set up using the CPS Tools program. To set up your shipping labels for UPW: Open **Setup → Carrier Parameters...**

The Carrier Information window appears:

The 'Carrier Information' dialog box is shown with the following components and annotations:

- Carrier:** A dropdown menu with "UPW" selected. An annotation points to this dropdown: "Choose UPW".
- Shipper Number:** A text box containing "NY 123-721".
- Carrier is Used:** A checked checkbox.
- Name:** A text box containing "Plantrol Systems, Inc."
- Address:** A text box containing "YOUR COMPANY ADDRESS".
- City:** A text box containing "CITY".
- State:** A text box containing "NY".
- ZIP/Postal:** A text box containing "14787".
- Phone:** A text box containing "716-326-4900".
- COD Handling Charge:** A text box containing "0.00".
- Buttons:** "Close", "Help", "Edit ZIP Zone Table", "Create a Carrier", and "Tracking".

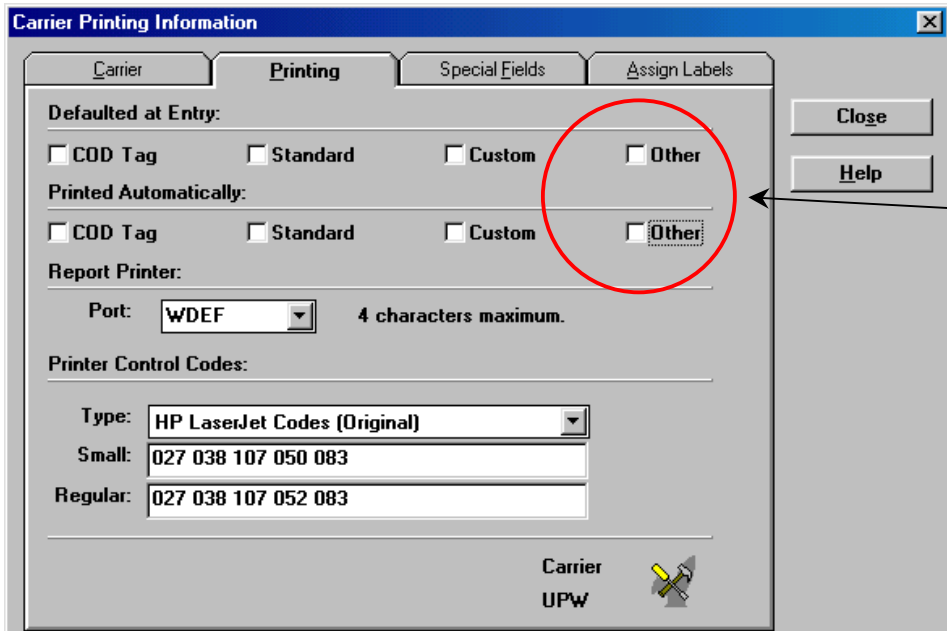
Choose “UPW” as the Carrier and confirm the information. Click the Printing tab to display the Printing Information window:



The screenshot shows the 'Carrier Printing Information' window with the 'Printing' tab selected. The 'Defaulted at Entry' and 'Printed Automatically' sections each have four checkboxes: 'COD Tag', 'Standard', 'Custom', and 'Other'. In both sections, the 'Other' checkbox is checked and circled in red. A callout box points to these two 'Other' checkboxes with the text 'Check these 2 boxes'. The 'Report Printer' section shows 'Port: WDEF' and '4 characters maximum.'. The 'Printer Control Codes' section shows 'Type: HP LaserJet Codes (Original)', 'Small: 027 038 107 050 083', and 'Regular: 027 038 107 052 083'. The 'Carrier' field at the bottom is set to 'UPW'.

Check “Other” for both Defaulted at Entry and Printed Automatically.

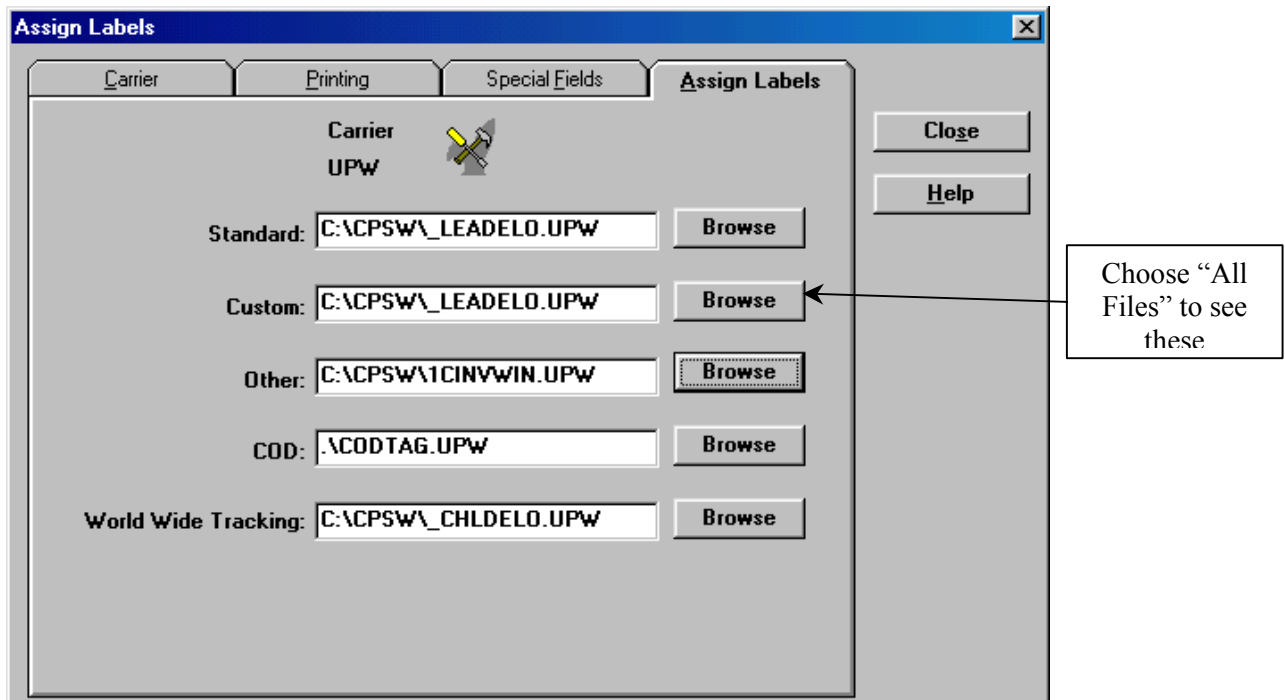
**Note:** After processing your first international shipment, return to the Printing tab and remove the checks from both of the “Other” boxes. This ensures the proper number of commercial invoices print:



The screenshot shows the 'Carrier Printing Information' window with the 'Printing' tab selected. The 'Defaulted at Entry' and 'Printed Automatically' sections each have four checkboxes: 'COD Tag', 'Standard', 'Custom', and 'Other'. In both sections, the 'Other' checkbox is unselected and circled in red. A callout box points to these two 'Other' checkboxes with the text 'Remove these check marks.'. The 'Report Printer' section shows 'Port: WDEF' and '4 characters maximum.'. The 'Printer Control Codes' section shows 'Type: HP LaserJet Codes (Original)', 'Small: 027 038 107 050 083', and 'Regular: 027 038 107 052 083'. The 'Carrier' field at the bottom is set to 'UPW'.

Once the entire set-up process is complete, Plantrol recommends creating a test UPW shipment, voiding it, and then coming back to this screen and clearing these two check boxes.

Next, click the Assign Labels tab:



Check to make sure your printing labels match those in the above screen shot.

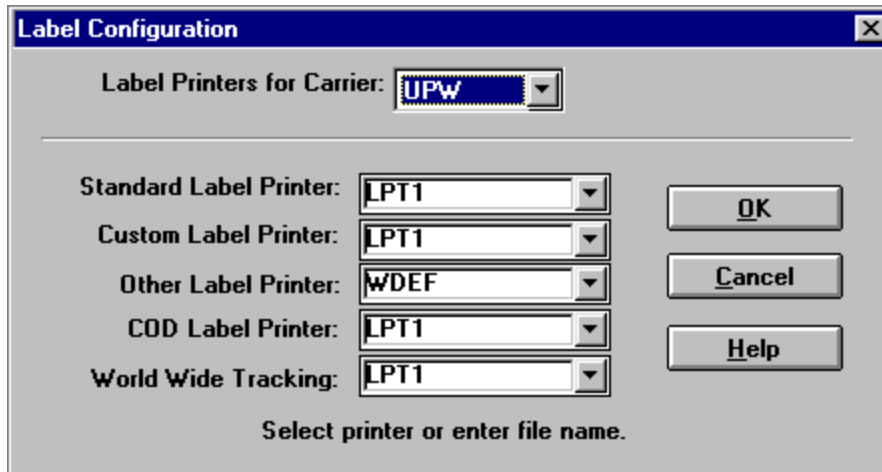
Field	Prints	File Name
Standard	Standard carrier label	_LEADELO.UPW
Custom	Thermal Waybill (lead package label)	_LEADELO.UPW
Other	Commercial Invoice	1CINVWIN.UPW
COD	COD Label	CODTAG.UPW
World Wide Tracking	Child Label	_CHLDELO.UPW

**Note:** If any of the above label files are missing from your system, call Plantrol for assistance.

Click the Close button when done. Next, you need to change your label printers:

Open **Setup → Change Label Printers...**

The Label Configuration window appears:



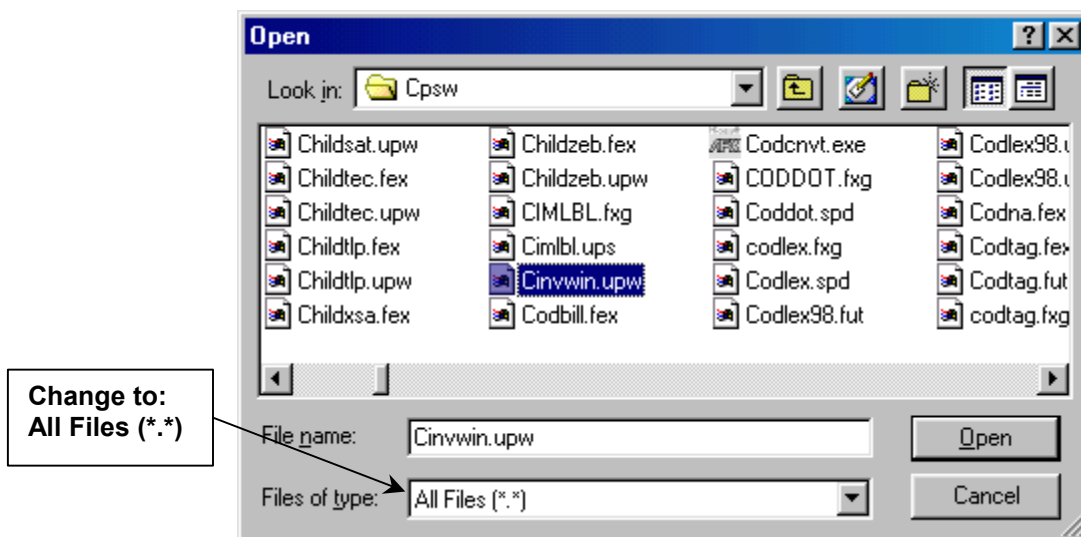
Make sure your settings match the ones in the screen shot. LPT1 is the thermal printer: Orion 2543. Click OK when finished. Close the CPS Tools program.

## Export Documentation Copies

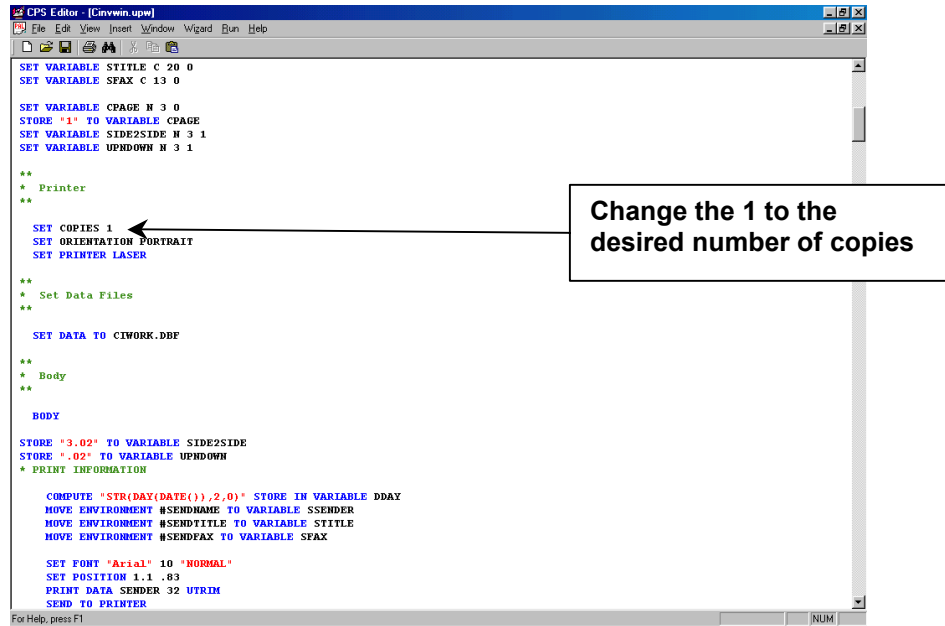
The commercial invoice defaults to print 1 copy, but 3 hard copies are required for customs. You can change this default to print up to 9 copies by editing the CINVWIN.UPW file. To edit the number of copies:

Start→Programs→CPS→CPS Editor

The CPS Editor displays. Open **C:\Cpsw\Cinvwin.upw**. You will need to change the files of type box to All Files and scroll over quite a bit to display the **Cinvwin.upw** file. Highlight **Cinvwin.upw** and click the Open button.



The file displays:

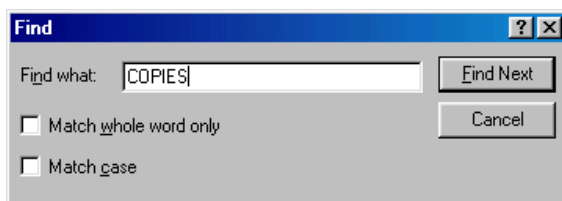


Change the number of copies and save the file.

By default, one copy of the Certificate of Origin (CO) is set to print with each international transaction. There are two versions of this document. One is for NAFTA shipments (nafta.upw) and the second is for all other shipments (nonafta.upw). You can edit the “Set Copies” line in these documents also to change the number of copies that print. To find this line easily:

### Select Edit→ Find

Enter a search term in the Find What box . Then, click the Find Next button:



The Certificate of Origin for non-NAFTA (nonnafta.upw) parcels contains the “Vice President” title as default. You can change this to whatever title you want. Follow the instructions above, except search for “VICE.”

When you are done editing the export documentation files, be sure to save your work. Then, close the CPS Editor program.



## Adding States

To prepare for international shipments, you will need to add State codes for some of the countries you will be shipping to. For example, if you are shipping to Canadian provinces or the Virgin Islands, you will need to add the state codes for these places so they are available for use in OmniShip. You will also need to add a blank value to use for destinations that do not use state codes.

To add additional state codes, refer to section 13.1 (How to Add or Delete a Carrier) in your OmniShip manual. Instead of changing the SVIA\$ (carrier) variable, add codes to the STATES\$ variable, which is the variable for the state codes. Here is a list of Canadian provinces for reference:

Code	Province
NF	Newfoundland
NB	New Brunswick
NS	Nova Scotia
PE	Prince Edward Island
QC	Québec
ON	Ontario
MB	Manitoba
SK	Saskatchewan
AB	Alberta
BC	British Columbia
NT	Northwest Territories
YT	Yukon

Note: Shipments to Puerto Rico can be shipped via regular UPS, while shipments to other US territories need to be shipped with UPW.

## CREATE AND PROCESS THE SHIPMENT

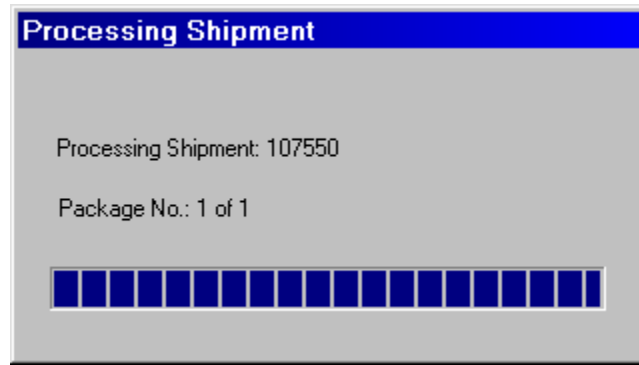
The first step to process an international shipment is the same as any regular shipment:

The screenshot shows the 'Belknap Business Forms - Shipping' application window. The 'Shipment Entry' form is active, with the 'OMNISHIP' logo. The form is divided into several sections:

- Top Section:** Includes fields for 'Shipment Number' (107550), 'Carrier' (UPW), 'Service Level' (Worldwide Express), 'Kind', and 'Shipper ID' (443556). A 'Process Shipment' button is on the right.
- Ship To Section:** Includes 'Customer' and 'Warehouse' radio buttons, 'Bill To' (666700), 'Ship To', 'Company Name' (STATIONERY), 'Attention Line' (SMITH), 'Street Address' (28 PARK ST), 'Address Line 2', 'Address Line 3', 'Country' (CANADA), 'City' (MISSISSAUGA), 'State' (ON), 'Zip Code' (L5R ZR3), 'CC', 'Phone', and 'Fax'.
- Shipping Options Section:** Includes 'Ship Date' (12-10-02), 'Billing Options' (Shipper), 'Freight Terms' (PPD/Add), 'FOB' (Dest.), 'Print Options' (Thermal Address Label, Standard / GPO Labels, Distributor Labels, Packing List / BOL), 'Shipped By' (SHIP), 'Air Bill / Pro Number', 'Inside Delivery', and 'Print on Packing List'.
- Order Info Section:** Includes 'Order No.' (ORDER: 67550), 'Shipment' (172), 'Sched. Ship Date' (11-01-00), 'Total Weight' (23), 'Shipping Charges', and 'Remove from Shipment' button.
- Cartons for: INVOICE Table:**

Package Type	# of Ctns	Carton Weight	Qty per Carton
Single	1	23	10000
- Bottom Section:** Includes 'Add Release', 'Add Order', 'Total Weight' (23), 'Cartons Shipped' (1), 'Shipping Charges', and a status bar with 'Viewing', '6/25/02 4:00:34 PM', '7/12/02 11:58:27 AM', 'many', 'Record: 4544', 'CAPS', 'NUM', and 'INS'.

1. Create the shipment, as you usually would, choosing UPW for the carrier. You may choose one of three service levels: Worldwide Expedited, Worldwide Express or Standard.
2. Verify the address. Make sure you select the correct country (UNITED STATES is the default). The Canadian provinces are included in the State field. Having the correct and complete address is critical here. OmniShip does verification of Canadian postal codes and will not allow a shipment to Canada to be processed without the correct postal code.
3. Make entries to the Items tab, if necessary. Some services may not be available for international shipping.
4. Click the Process Shipment button. The following screen appears:



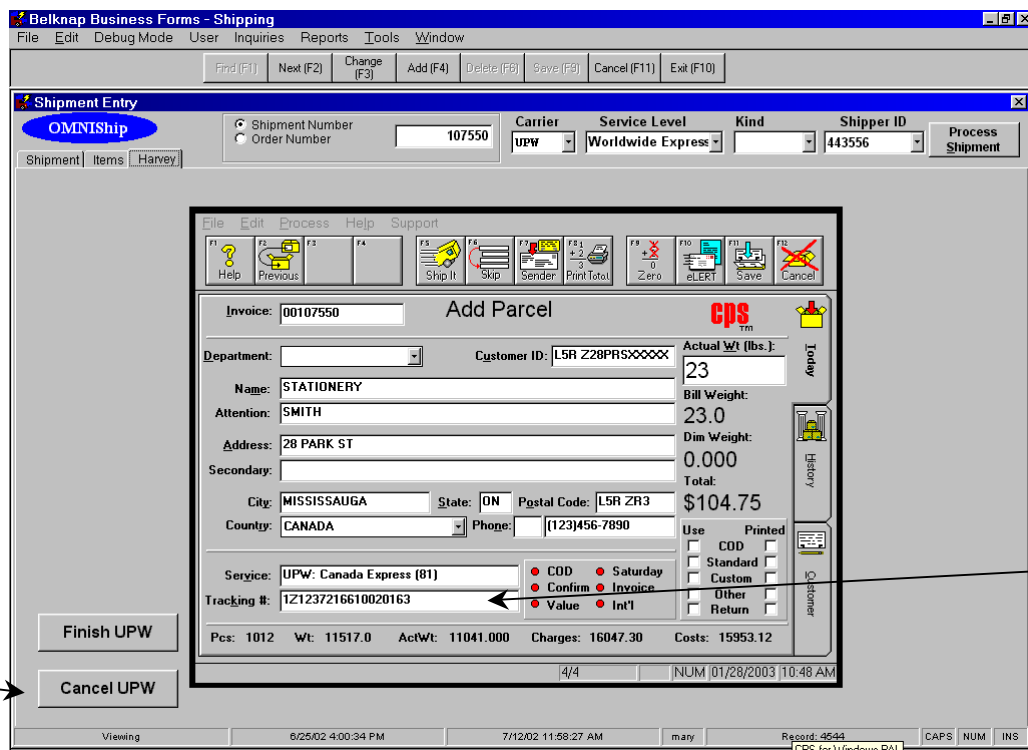
**Processing Shipment**

Processing Shipment: 107550

Package No.: 1 of 1

[Progress Bar]

When the Omni shipment is processed, the Harvey tab displays:



**Belknap Business Forms - Shipping**

File Edit Debug Mode User Inquiries Reports Tools Window

Find (F1) Next (F2) Change (F3) Add (F4) Delete (F5) Save (F9) Cancel (F11) Exit (F10)

**Shipment Entry**

OMNISHip Shipment Number 107550 Carrier UPW Service Level Worldwide Express Kind Shipper ID 443556 Process Shipment

Shipment Items Harvey

**Add Parcel**

Invoice: 00107550

Department: STATIONERY Customer ID: L5R Z28PRSXXXXX Actual Wt (lbs.): 23

Name: SMITH Bill Weight: 23.0

Attention: SMITH Dim Weight: 0.000

Address: 28 PARK ST Total: \$104.75

Secondary: City: MISSISSAUGA State: ON Postal Code: L5R 2R3

Country: CANADA Phone: (123)456-7890

Service: UPW: Canada Express (81) COD Confirm Invoice Value Int'l

Tracking #: 1Z1237216610020163

Pcs: 1012 Wt: 11517.0 ActWt: 11041.000 Charges: 16047.30 Costs: 15953.12

4/4 NUM 01/28/2003 10:48 AM

Finish UPW Cancel UPW

Viewing 6/25/02 4:00:34 PM 7/12/02 11:58:27 AM mary Report: 4544 CAPS NUM INS CPS for Windows PAL

Cancel UPW Button

Tracking # Text Box

Do not make changes to this screen. If you need to make changes, return to OmniShip by using the Cancel UPW button. The F11 key and the Shipment and Items tabs are functional in OmniShip, but not in Harvey.

To continue, click in the Tracking # text box. If no tracking number appears, try clicking the Tracking button:



If you still do not receive a Tracking number or you receive an error message about the Tracking Number or Postal Code, click the Cancel UPW button to return to OmniShip and verify that the address is correct and complete.

## ENTER WORLDWIDE INFORMATION

When you click in the tracking number text box, the Worldwide Information window appears:

The screenshot shows the 'UPS Worldwide Information' dialog box. It contains several sections of input fields. Callouts point to specific areas: one points to the 'UPS World Ease (sm) Services' section with the text 'These four fields are optional'; another points to the 'Description of Goods' and 'Customs Value' fields with the text 'These fields populate after you enter Invoice info.'; and a third points to the 'Prepare SED' and 'Prepare CO' dropdowns with the text 'Choose CPS Generated if needed'.

**UPS Worldwide Information**

**UPS World Ease (sm) Services:**

- ☐ Single Country Clearance ☐ Set As Default
- ☐ European Consolidated Clearance

**Shipper ID Number:** 123123

**Name of Sender:** Plantrol Systems, Ltd.

**Consignee UPS #:** 123456 **Customs ID:**

**Payment of Charges:** Prepaid

**3rd Party Name:**

**Account #:**

**Type of Shipment:** Non-Document - CPS Generated Invoice

**Number of Packages:** 1 **Packaging:** Customer Supplied Box

**Description of Goods:**

**Customs Value:** 0.00 **Insurance:** 0 ☐ Saturday Delivery

**Reference #1:** 67550

**Reference #2:**

**Special Instructions:**

**Prepare SED:** None **Prepare CO:** None

**Buttons:** OK, Cancel, Invoice, Help

The Shipper ID Number and other 3 fields in the first section are optional. The Payment of Charges defaults to Bill Duty, Tax & Charges. The other fields in this section are related to other types of payments. Here is a description of the UPS International Payment of Charges Options:

**Prepaid** - Shipper pays all shipping charges; consignee or importer pays duty and Value Added Tax (V.A.T.).

**Freight Collect** - Consignee or importer pays all shipping charges, duty and V.A.T.

**Delivered Duty Paid, V.A.T. Unpaid** - Shipper pays shipping charges and duty; consignee pays V.A.T.

**Bill Duty, Tax, and Shipping Charges to Shipper** - Shipper pays destination country's duty and tax as well as all shipping charges.

The Type of Shipment defaults to "Non Document – CPS Generated Invoice." This shipment type collects information and creates the required commercial invoice. If you are creating

your own invoices and you do not want a CPS generated invoice, choose “Non Document – Customer Supplied Invoice.” Do not complete the Invoice section if you choose this option.

If you chose the default Type of Shipment (“Non Document – CPS Generated Invoice”), click OK to continue. The other fields will populate automatically. If you choose “Non Document – Customer Supplied Invoice,” complete the applicable fields on this window and click OK.

If you accidentally click cancel and the Worldwide Information window disappears, click the Other button from the Harvey tab, Add Parcel screen to bring it back:



If your shipment requires an SED document, select Included for the Prepare SED field. Choosing Included while also choosing to not generate a Commercial Invoice brings the following window:

A dialog box titled "SED Information" with a close button (X) in the top right corner. The dialog box contains several input fields and dropdown menus. The fields are: "License Number:" (text input), "ECCN:" (text input), "Commodity Code:" (text input), "Origin Country:" (dropdown menu showing "UNITED STATES"), "Ultimate Country:" (dropdown menu showing "AL"), and "Parties to the transaction:" (dropdown menu showing "Not Related"). At the bottom of the dialog box are three buttons: "OK", "Cancel", and "Help".

License Number:	
ECCN:	
Commodity Code:	
Origin Country:	UNITED STATES
Ultimate Country:	AL
Parties to the transaction:	Not Related

## ENTER COMMERCIAL INVOICE INFORMATION

Clicking OK or the Invoice button from the Worldwide Information window (for “Non Document – CPS Generated Invoice” types) displays the Commercial Invoice Information window:

**Commercial Invoice Information**

**Sold To/Importer Information** (If different than Ship To)

Name:

Attention:

Address:

Address 2:

City:  State:

Postal Code:  Phone:  ( ) -

Country:

Importer UPS Account #:

**Terms of Sale:**

Currency:

Country of Ultimate Destination:

Reason for Export:

Parties to the Transaction:

☐ Add Shipping to Total

Description	Units	Unit Price	Total

The Bill To Information is pulled from the Ship To tab in OmniShip. If you are not billing a third party, you do not need to complete the bill to information (name, attention, address, terms and currency). If you are using a credit card, complete the Credit Card # and Expiration fields. Choose your destination country here.

Next, you need to add the product information for the commercial invoice. To add this information, click the Add button.

The Product Information window appears:

**Product Information**


Product Number:

Quantity:  Each  Unit Value:

Description:

License Number:  Exp Date:   
(mm/dd/yy)

ECCN:  Commodity Code:

Origin Country: UNITED STATES 

Ultimate Country: CANADA

---

**Shipper's Export Declaration (SED)**

Commodity Weight: 0.000 lbs. 0 kg.

Schedule B Unit of Measure: No Quantity Required

Schedule B Code:

Value (US Dollars):  Print on SED: ☐

---

**Certificate of Origin (CO)**

No. of Packages, Boxes or Cases:  NAFTA ☒ Generic ☐

Preference Criterion:  Producer:  Net Cost:

If you've set up the Product Information as described in section 7.2, you can select your products by number in the Product Number box. You can add products here by completing the product information and clicking the Save button before clicking OK. The Quantity field refers to the number of cartons.

Select the product, enter the required fields (Quantity, Unit Value, Description and both Country fields). The Origin Country selected here appears with the product on the Certificate of Origin and the SED.

If you are printing an SED document, add the value will calculate automatically and a check will appear in the Print On SED box if the value is greater than \$2,500. Click OK to return to the Commercial Invoice window.



**Commercial Invoice Information** [X]

**Sold To/Importer Information** (If different than Ship To)

**Name:**

**Attention:**

**Address:**

**Address 2:**

**City:**  **State:**

**Postal Code:**  **Phone:**  ( ) -

**Country:**


**Importer UPS Account #:**

**Terms of Sale:**

**Currency:**

**Country of Ultimate Destination:**

**Reason for Export:**

**Parties to the Transaction:**  

☐ Add Shipping to Total

Description	Units	Unit Price	Total
FORMS	2	587.000	1174.00
Total:			1174.00

Click the Add button if you need to add more products. Your total units should match your total number of cartons in the OmniShip record.

Click the Close button when finished to return to the Harvey tab displaying your UPW shipment:

Belknap Business Forms - Shipping

File Edit Debug Mode User Inquiries Reports Tools Window

Shipment Number  
Date Shipped: Shipment Number  
Status: Shipment Number

Find (F1) Next (F2) Change (F3) Add (F4) Delete (F5) Save (F6) Cancel (F11) Exit (F10)

Shipment Entry

OMNIShip

Shipment Number Order Number 107876

Carrier Service Level Kind Shipper ID Process Shipment

UPW Worldwide Express 443556

Shipment Items Harvey

File Edit Process Help Support

Help Other Dim Wt Ship It Tracking Print Total Zero eLERT Save Cancel

Invoice: 00107876 Add Parcel

Department: Customer ID: L5R Z28PRSXXXXX Actual Wt (lbs.): 46.000

Name: STATIONERY Bill Weight: 46.0

Attention: SMITH Dim Weight: 0.000

Address: 28 PARK ST Total: \$160.50

Secondary:

City: MISSISSAUGA State: ON Postal Code: L5R 2R3

Country: CANADA Phone: 1234567890

Service: UPW: Canada Express (81)

Tracking #: 1Z1237216610020298

Use COD Printed

Standard Custom Other Return

Pcs: 1012 Wt: 11517.0 ActWt: 11041.000 Charges: 16047.30 Costs: 15953.12

5/5 NUM 01/28/2003 12:51 PM

Viewing 6/25/02 4:00:34 PM 1/28/03 11:47:32 AM frank Record: 4544 CAPS NUM

Finish UPW button

Finish UPW

Cancel UPW

Invoice and Waybill are now selected

This screen is updated from information you've entered and the Invoice and Waybill buttons are now selected. Click the Finish UPW button to process your shipment. It may take a while to process.

## ADD PACKAGE WEIGHT INFORMATION

After clicking the Process UPW button, the Collect Weights window appears (if you have more than 1 carton):

Collect Weights

Parcel Weight

☒ Same for all Parcels

☐ Different Weights

You are about to enter 2 packages

OK Cancel Help

Indicates number of packages

Select either the Same Weight for all Parcels or Different Weights. If you choose "Same" you will be asked to indicate the weight once:

**Shipment Entry Weight**

Invoice: 00106684

Actual Weight:

Dimensional Weight: 0.00

Bill Weight: 5.0

WorldWide:

Buttons: F4 Scale, F3 - Dim Wt., F7 - AutoTrack, OK, Cancel, Help

If you choose “Different,” you need to specify the weight of each package. A window appears for each package, starting with the first child package (package 2 of N):

**Shipment Entry Weight**

Invoice: 00106710-002 2 of 2

Actual Weight:

Dimensional Weight: 0.00

Bill Weight: 5.0

WorldWide:

Buttons: F4 Scale, F3 - Dim Wt., F7 - AutoTrack, OK, Cancel, Help

Indicates package number

You need to enter the weight for all of the child packages (package 2 to package N). The last package weight you enter will be for the lead package (package 1):

Shipment Entry Weight

Invoice: 00106710-001 1 of 2

Actual Weight: 0.000

Dimensional Weight: 0.00

Bill Weight: 0.0

Waybill: 1Z1237216710000325

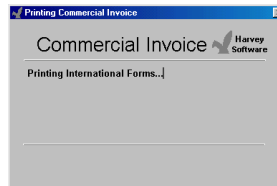
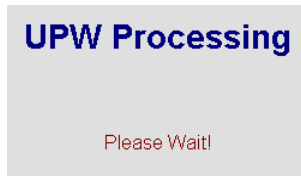
OK Cancel Help

The child labels print as you enter each weight. When you've completed entering the package weights, click OK.

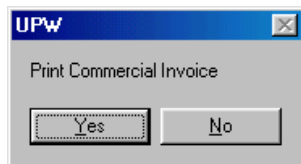
**Note:** At this time, there is no way to reprint a child label. You can reprint the lead package waybill, which contains information about the entire shipment but not the child labels. If your child labels are damaged or do not print, void the shipment and reprocess.

## PROCESS THE UPW SHIPMENT

Clicking OK to the package weight window for your parent package processes your shipment:

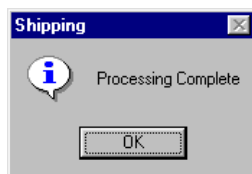


Click Yes to print the commercial invoice:



**Note:** The first time you click “Yes” to print the commercial invoice, you should receive double the number you specified during set-up. Return section 7.2 Set-up Defaults – Shipping Labels for information on correcting this.

When complete, the parent label and commercial invoice(s) print (to your default printer) and this message displays:



The Harvey program determines if Certificates of Origin (NAFTA and NON-NAFTA) are also required and prints the appropriate documents. Here is an example of a non-NAFTA commercial invoice:

COMMERCIAL INVOICE					
<b>FROM:</b> SHARON WEILER PLANTROL SYSTEMS, INC. YOUR COMPANY ADDRESS CITY, NY 14787 UNITED STATES PHONE: 716-326-4800			<b>DATE:</b> DEC 20 2000  <b>INVOICE #:</b> 00106433  <b>PURCHASE ORDER:</b>		
<b>SHIP TO:</b> ATTN: RECEIVING OUR BEST CUSTOMER 100 MAIN STREET MISSISSAUGA, ON L5R2R3 CANADA PHONE:			<b>SOLD TO:</b> RECEIVING OUR BEST CUSTOMER 100 MAIN STREET MISSISSAUGA, ON L5R2R3 PHONE:		
<b>No. of Packages:</b> 1 <b>Currency Type:</b> US DOLLARS <b>Weight:</b> 15 LBS <b>Terms:</b>					
No. Units	Description of Goods Harmonized System Tariff Number (if known)	Country of Origin	Unit Value	Total Value	
10	Forms	US	240.0000	2400.00	
				<b>Subtotal</b>	2400.00
				<b>Grand Total</b>	2400.00
WAYBILL TRACKING #: 1Z1237216710000969 THESE COMMODITIES ARE LICENSED FOR THE ULTIMATE DESTINATION AS SHOWN. DIVERSION CONTRARY TO THE UNITED STATES LAW IS PROHIBITED.					
<b>TRAFFIC MANAGER</b> _____ <b>Date</b> _____					

PAGE 1

Here is an example of a Certificate of Origin:

CERTIFICATE OF ORIGIN			
The undersigned <u>SHARON WEILER</u> for <u>PLANTROL SYSTEMS, INC.</u> <small>(Owner or Agent, or &amp;c)</small> <small>(Name of Shipper)</small>			
<u>YOUR COMPANY ADDRESS, CITY, NY 14787</u> declares that the following mentioned goods shipped <small>(Address of Shipper)</small>			
to <u>ANDERSON STATIONARY</u> on the date of <u>FEB 23 2001</u> consigned to <u>ANDERSON STATIONARY, 528 GALAXY COURT,</u>			
<u>PARIS, FRANCE</u> are the product of <u>US</u>			
MARKS AND NUMBERS	NO. OF PKGS., BOXES OR CASES	WEIGHT IN KILOS GROSS	DESCRIPTION
SHIPMENT ID: 12372179XN3	0  0	0  0	INVOICE: 00107237  100 Carbon Forms  500 forms
Sworn to before me      Dated at <u>CITY, NY</u>  this <u>23<sup>rd</sup></u> day of <u>Feb</u> 2001      on <u>FEB 23 2001</u>  _____ <u>SHARON WEILER</u> <small>(NOTARY PUBLIC)</small> <small>(Signature of Owner or Agent)</small>			
The _____, a recognized Chamber of Commerce under the laws of the State of _____ has examined the manufacturer's invoice or shipper's affidavit concerning the origin of the merchandise and, according to the best of its knowledge and belief, finds that the products named originated in the United States of North America.			

Here is an example of a NAFTA Certificate of Origin:

DEPARTMENT OF THE TREASURY UNITED STATES CUSTOMS SERVICE NORTH AMERICAN FREE TRADE AGREEMENT CERTIFICATE OF ORIGIN									
Please print or type 1. EXPORTER NAME AND ADDRESS PLANTROL SYSTEMS, INC. YOUR COMPANY ADDRESS CITY, NY 14787					19 CFR 181.11.181.22 2. BLANKET PERIOD (DDMMYY) FROM 23/02/2001 TO 23/02/2002				
TAX IDENTIFICATION NUMBER: 3. PRODUCER NAME AND ADDRESS AVAILABLE TO CUSTOMS UPON REQUEST					4. IMPORTER NAME AND ADDRESS ANDERSON STATIONARY 528 GALAXY COURT MISSISSAUGA, ON L5R2H3 CANADA				
TAX IDENTIFICATION NUMBER					TAX IDENTIFICATION NUMBER				
5. DESCRIPTION OF GOOD(S)					6. HS TARIFF CLASSIFICATION NUMBER	7. PREFERENCE CRITERION	8. PRODUCER	9. NET COST	10. COUNTRY OF ORIGIN
INVOICE: 00107236					0018015				GB US
25 Carbon Pomsa 1500 envelopes									
I CERTIFY THAT: • THE INFORMATION ON THIS DOCUMENT IS TRUE AND ACCURATE AND I ASSUME THE RESPONSIBILITY FOR PROVING SUCH REPRESENTATIONS. I UNDERSTAND THAT I AM LIABLE FOR ANY FALSE STATEMENTS OR MATERIAL OMISSIONS MADE ON OR IN CONNECTION WITH THIS DOCUMENT. • I AGREE TO MAINTAIN, AND PRESENT UPON REQUEST, DOCUMENTATION NECESSARY TO SUPPORT THIS CERTIFICATE, AND TO INFORM, IN WRITING, ALL PERSONS TO WHOM THE CERTIFICATE WAS GIVEN OF ANY CHANGES THAT COULD AFFECT THE ACCURACY OR VALIDITY OF THIS CERTIFICATE. • THE GOODS ORIGINATED IN THE TERRITORY OF 1 OR MORE OF THE PARTIES, AND COMPLY WITH THE ORIGIN REQUIREMENTS SPECIFIED FOR THOSE GOODS IN THE NORTH AMERICAN FREE TRADE AGREEMENT, AND UNLESS SPECIFICALLY EXEMPTED IN ARTICLE 411 OR ANNEX 401, THERE HAS BEEN NO FURTHER PRODUCTION OR ANY OTHER OPERATION OUTSIDE THE TERRITORIES OF THE PARTIES, AND • THIS CERTIFICATE CONSISTS OF 1 PAGES, INCLUDING ALL ATTACHMENTS.									
11. (11a) AUTHORIZED SIGNATURE TIC NAME (print or type) TIC DATE (DDMMYY) 02-23-01					(11b) COMPANY PLANTROL SYSTEMS, INC. TIC TITLE TIC PHONE NUMBER 716-326-4900				

Here is an example of a Shipper's Export Declaration:

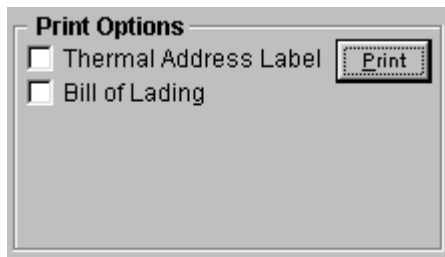
U.S. DEPARTMENT OF COMMERCE - BUREAU OF THE CENSUS - INTERNATIONAL TRADE ADMINISTRATION FORM 7525-V (1-1-88) SHIPPER'S EXPORT DECLARATION OMB No. 0607-0019									
1a. EXPORTER (Name and address including ZIP code) PLANTROL SYSTEMS, INC. YOUR COMPANY ADDRESS, CITY				2. ZIP CODE 14787		3. DATE OF EXPORTATION 02-23-01		4. BILL OF LADEN/SHIPWAY/STILL NO. 12372179XKZ	
5. EXPORTER'S EIN (IRS) NO.				6. PARTIES TO TRANSACTION <input type="checkbox"/> None <input checked="" type="checkbox"/> Non-ident					
7a. ULTIMATE CONSIGNEE ANDERSON STATIONARY 528 GALAXY COURT L5R2H3 MISSISSAUGA CANADA				7b. INTERMEDIATE CONSIGNEE					
8. FORWARDING AGENT N/A				9. PORT (BY/STATE) OF ORIGIN OR PIZ NO. NY, USA					
10. LOADING PIER (Vessel only)				11. MODE OF TRANSPORT (Specify) AIR					
12. EXPORTING CARRIER United Parcel Service				13. PORT OF EXPORT					
14. PORT OF UNLOADING (Vessel and air only)				15. CONTAINER/EEZ (Vessel only) <input type="checkbox"/> Yes <input type="checkbox"/> No					
16. SCHEDULE B DESCRIPTION OF COMMODITIES 17. MARKS, NOS. AND KINDS OF PACKAGES 18. SCHEDULE B NUMBER 19. SHIPPING WEIGHT (LBS) 20. VALUE (U.S. dollars, unit costs) (Shipping price is cost if not zero)									
21. VALIDATED LICENSE NO./GENERAL LICENSE SYMBOL 02-23-01 (SEE ECHN (N/A) (N/A))									
22. I, the undersigned, certify that the information furnished herein is true and correct and that I have reviewed and signed the declaration for preparation of this document. I understand that this document is required for the preparation of this document. I understand that this document is required for the preparation of this document. I understand that this document is required for the preparation of this document.									
23. AUTHENTICATION (When required)									

## REPRINTING THE COMMERCIAL INVOICE

There may be instances when you need to reprint a copy of the commercial invoice for an international shipment.

To reprint a commercial invoice:

1. In OmniShip, bring up the shipment.
2. Make sure no printing options are selected and click the Print button.



3. The commercial invoices will print. You will receive the default number of copies.

**Note:** You can reprint a commercial invoice for the current ship day prior to conducting your end of day processing. Once shipments have been moved to history, reprints can only be made after incrementing the current ship day.



# LABELS, PACKING LISTS, AND BILLS OF LADING

## HOW TO PRINT DOCUMENTS

Your shipping documents are specific to your company. The layout and look of your labels, packing list, and bills of lading will be unique and customized to your needs. Not all installations will include all of these documents, and some will contain many more.

There are several ways to print shipping documents. Which method works best will depend on the status of the shipment.

### Printing documents **BEFORE** the shipment is processed

#### 1<sup>st</sup> Method – SAVE the shipment, then PRINT

ALLIED OMNI SHIP

File Edit User Inquiries Reports Tools Window

Find (F1) Next (F2) Change (F3) Add (F4) Delete (F5) Save (F9) Cancel (F11) Exit (F10)

Shipment Entry

OMNISHIP

Shipment Number 300494

Carrier RS Service Level Red Star Kind Shipper ID RI 021.231 Process Shipment

Ship To Customer Warehouse Bill To 2666 Ship To WHSE

Ship Date 12-28-99

Print Options

☐ Thermal Address Label

☐ Regular Carton Label

☒ Distributor Carton Label

☒ Packing List / BOL

Shipped By: AAPLA

Inside Delivery

Shipping Instructions

Order Info

ORDER: 184426

Line Item	Item Number	Package Merchandise Desc.	Quantity Ordered	Quantity Shipped	Inventory Unit	Unit Quantity
1	84-00-31	CONFIDENTL COVER SHT/RO A-3	5000	4500	PKG	50

Cartons for: CONFIDENTL

Package Type	# of Ctns	Carton Weight	Qty per Carton
Single	3	27	1500

Total Weight 81 Cartons Shipped 3 Shipping Charges

Enter the shipment normally, but do not PROCESS SHIPMENT.

SAVE (F9) the shipment, click the check boxes next to the documents you wish to print, click PRINT. The UPS labels cannot be printed until you process the shipment.

If your system includes the “Create Label” option, found on the User Menu, you can enter shipments and print labels directly from this screen, shown below. Use the buttons in the upper right to SAVE shipments and PRINT labels.

Label Printing Screen

Job Number

10170

CREATING  
NEW SHIPMENT

Label Type

☐ Regular  
☐ Dealer  
☐ Custom

S/W

☒ To Customer  
☐ To Vendor  
☐ To Warehouse

SAVE

PRINT

CANCEL

AAB

SHIP FROM

Ship From

Magic Marketing & Graphics

Address 1

Address 2

P.O. Box 360658

City

Strongsville

State

OH

Zip

44136

Cost Center

Customer PO:

Distributor PO:

Parts

3

Item Number

Overall Size

8- 1/ 2

x

14- 1/ 2

ITEM DESCRIPTION

Name

☒ Use Ship To

ship to name

Attention Line

Street Address

ship to address

ship to address 2

City

city

State

OH

Zip

10001

1459

Special Instructions

shipping instructions go here

more ship instr.

more ship instr.

and even more ship instr.

Shipment  
Quantity

1540

Quantity  
Per Ctn

Number of  
Labels

Starting Consecutive  
Number

Starting  
Carton #

1

Pad / Book  
Quantity

0

Inner Packaging  
Quantity

0

Type

## How to print documents as part of the shipping process

When you click the PROCESS SHIPMENT button, all checked documents will be printed.

As shown below, Distributor carton labels and the Packing List/BOL form will be printed for shipment number 300494 when the PROCESS SHIPMENT button is clicked.

**ALLIED OMNI SHIP**

File Edit User Inquiries Reports Tools Window

Find (F1) Next (F2) Change (F3) Add (F4) Delete (F6) Save (F8) Cancel (F11) Exit (F10)

**Shipment Entry**

OMNISHIP

Shipment Number: 300494 Carrier: RS Service Level: Red Star Kind: Shipper ID: RI 021-231

Process Shipment

Ship To: Customer Warehouse Bill To: 2666 Ship To: WHSE

Company Name: THE RECEIVING COMPANY Attention Line: MARY Street Address: C/O WAREHOUSE Address Line 2: 30 WEST STREET EAST Address Line 3: Country: UNITED STATES City: NEW YORK State: NY Zip Code: 10011

Ship Date: 12-28-99 Billing Options: Shipper: Freight Terms: PPD/Add FOB: Plant

Print Options: Thermal Address Label Regular Carton Label Distributor Carton Label Packing List / BOL

Shipped By: AAPLA

Shipping Instructions: Print on Packing List

Order Info: ORDER: 184426

Line	Item	Package	Merchandise Desc.	Quantity Ordered	Quantity Shipped	Inventory Unit	Unit Quantity
1	84-00-31	CONFIDENTL COVER SHT/RD A-3		5000	4500	PKG	50

Cartons for: CONFIDENTL

Package Type	# of Ctns	Carton Weight	Qty per Carton
Single	3	27	1500
Single			
*			

Total Weight: 81 Cartons Shipped: 3 Shipping Charges:

## How to print documents AFTER the shipment is processed

Once the shipment has been processed, you can reprint the documents (including the UPS label) by finding the shipment, selecting the documents to be printed, and clicking the PRINT button, as shown in Method 1 below.

Method 2, using the Reports Menu, can be used to reprint the forms other than the thermal labels, and is shown opposite.

## 1<sup>st</sup> Method – FIND the shipment, then PRINT

**ALLIED OMNI SHIP**

File Edit User Inquiries Reports Tools Window

Find (F1) Next (F2) Change (F3) Add (F4) Delete (F5) Save (F6) Cancel (F11) Exit (F10)

**Shipment Entry**

**OMNISHIP**

Shipment | Items | Harvey

Shipment Number: 300494 Carrier: ups Service Level: Ground Kind: RI 021-231 Shipper ID: AAPLA

Ship To: Customer Warehouse Bill To: 2666 Ship To: WHSE

Company Name: THE RECEIVING COMPANY  
 Attention Line: MARY  
 Street Address: C/O WAREHOUSE  
 Address Line 2: 30 WEST STREET EAST  
 Address Line 3:   
 Country: UNITED STATES City: PORTSMOUTH State: NH Zip Code: 35777  
 Phone: Fax: Tax Code: NH 9999

Ship Date: 12-30-99  
 Billing Options: Shipper  
 Freight Terms: PPD/ADD  
 FOB: Plant  
 Shipping Instructions:   
 Print Options:   
☒ Thermal Address Label   
☐ Regular Carton Label  
☐ Distributor Carton Label  
☐ Packing List/BOL  
 Shipped By: AAPLA  
☐ Inside Delivery  
☐ Print on Packing List

**Order Info**

ORDER: 184426

Line	Item	Package Merchandise Desc.	Quantity Ordered	Quantity Shipped	Inventory Unit	Unit Quantity	P
1	84-00-31	CONFIDENTL COVER SHT/RD A-3	5000	4500	PKG	50	

Shipment: 4 Partial  
 Sched. Ship Date:   
 Total Weight: 81 Shipping Charges: 26.58

Remove from Shipment Add Release Add Order Total Weight: 81 Cartons Shipped: 3 Shipping Charges: 26.58

Viewing 12/30/99 9:09:30 AM 12/30/99 9:43:55 AM AAPLA Record: 107 CAPS NUM INS

Use the print options to print documents for a processed shipment.

FIND the shipment normally, and do not void or delete it. You will not be able to make changes, but you can click the check boxes next to the documents you wish to print, click PRINT. UPS labels can be reprinted using this method.

## 2<sup>nd</sup> Method – Use the Reports Menu

Click on REPORTS – All Available Reports. Select the document you wish to print from the list at top left. Input the requested shipment and job information. Select the printer, and click PRINT.

Reports

SH Omni Ship Report  
SH Print Carton Labels  
SH Print PackList

Curt Lineprtr 8 Ipi Landscap

QUEUE @LPT  
☐ Default Que

COPIES

SPECIAL FORM LABELS

☐ PRINT IN BATCH

PRINT CANCEL

Start Values

Report Date 10-18-99

Shipment Number

Job Number

Job Type

FAX NUMBER

FAX TO

FAX FROM

☐ SCREEN OUTPUT

### JOB TYPE CODES

OE	Order
FM	Release
MS	Miscellaneous

## STANDARD FORMS

Although many shipping documents are customized for specific purposes and include company logos and requirements, Plantrol does support the formats shown here as standard forms.

# Packing list/Bill of Lading for impact printers

PACKING LIST									
FACTORY NUMBER		SHIPMENT	DISTRIBUTOR P.O. NUMBER		CUSTOMER P.O. NUMBER		CARRIER		DATE SHIPPED
<b>F R O M</b>					<b>T O</b>				
	STATUS		FREIGHT TERMS		SHIPPED BY		CHARGES		PAGE _____ OF _____
QUANTITY ORDERED		PARTS	DESCRIPTION						
NUMBER OF CARTONS	QUANTITY PER CARTON	FIRST NUMBER		LAST NUMBER		NUMBER MISSING	TOTAL QUANTITY	WEIGHT PER CARTON	TOTAL WEIGHT
No. CARTONS		FIRST NUMBER PRINTED		LAST NUMBER PRINTED		TOTAL MISSING	TOTAL SHIPPED		TOTAL WEIGHT
MISSING NUMBERS:									
<div style="display: flex; justify-content: space-between;"> <div> <b>STRAIGHT BILL OF LADING-SHORT FORM-Original-Not Negotiable</b>  <small>RECEIVED, subject to the classifications and lawfully filed tariffs in effect on the date of the issue of this Bill of Lading.</small> </div> <div>CARRIER</div> <div>SHIPPER'S NUMBER</div> </div>									
<b>PROTECT THRU RATE</b>									
DATE SHIPPED		SHIPPER				CONSIGNED TO AND DESTINATION			
CUSTOMER P.O. NUMBER				DISTRIBUTOR P.O. NUMBER					
<small>The property described below, in apparent good order, except as noted (contents and conditions of contents of packages unknown), marked, consigned, and destined as indicated below, which said carrier (the word carrier being understood throughout this contract as meaning any person or corporation in possession of the property under the contract) agrees to carry to its usual place of delivery of said destination, if on its route, otherwise to deliver to another carrier on the route to said destination. It is mutually agreed, as to each carrier of all or any of said property over all or any portion of said route to destination, and as to each party at any time interested in all or any of said property, that every service to be performed hereunder shall be subject to all the terms and conditions of the Uniform Domestic Straight Bill of Lading set forth (1) in Uniform Freight Classification in effect on the date hereof, if this is a rail or a rail-water shipment, or (2) in the applicable motor carrier classification or tariff if this is a motor carrier shipment. Shipper hereby certifies that he is familiar with all the terms and conditions of the said bill of lading, including those on the back thereof, set forth in the classification or tariff which governs the transportation of this shipment, and the said terms and conditions are hereby agreed to by the shipper and accepted for himself and his assigns. (Mail or street address of consignee - For purposes of notification only.)</small>									
PACKAGES	KIND OF PACKAGE, DESCRIPTION OF ARTICLES, SPECIAL MARKS AND EXCEPTIONS					WEIGHT	CLASS OR RATE	CHECK COL.	
<b>PRINTED FORMS</b>									
DELIVERY		ROUTE			DELIVERING CARRIER	CAR OR VEHICLE INITIALS		NUMBER	
Subject to Section 7 of conditions of applicable bill of lading, if this shipment is to be delivered to the consignee without recourse on the consignor the consignor shall sign the following statement:  The carrier shall not make delivery of this shipment without payment of freight and all other lawful charges.  Signature of the Consignor) _____  PERMANENT POST OFFICE ADDRESS OF SHIPPER _____					If charges are to be prepaid, write or stamp here, "To be Prepaid."  "If the shipment moves between two ports by a carrier by water, the law requires that the bill of lading shall state whether it is 'carrier's or shipper's weight.' NOTE—Where the rate is dependent on value, shippers are required to state specifically in writing the agreed or declared value of the property. The agreed or declared value of the property is hereby specifically stated by the shipper to be not exceeding _____ per _____		Received \$ _____ to apply in prepayment of the charges on the property described hereon. Agent or Carrier _____ PER _____ (The signature here acknowledges only the amount prepaid.)  Charges Advanced \$ _____ † Shipper's imprint in lieu of stamp; not a part of bill of lading approved by the Interstate Commerce Commission. ‡ The fibre boxes used for this shipment conform to the specifications set forth in the box maker's certificate thereon, and all other requirements of Uniform Freight Classification.  _____ Shipper, Per _____ _____ Agent, Per _____		

**TRUCKER'S COPY**

# Bill of Lading for laser printers

STRAIGHT BILL OF LADING – Short Form – Not Negotiable									
<b>SHIP FROM</b>				Bill of Lading Number: _____					
<b>SHIP TO</b>				CARRIER NAME: _____ Trailer number: _____ Seal number(s): _____					
<b>THIRD PARTY FREIGHT CHARGES BILL TO:</b>				SCAC: _____ Pro number: _____					
SPECIAL INSTRUCTIONS:				Freight Charge Terms: Prepaid _____ Collect _____ 3 <sup>rd</sup> Party _____					
				<input type="checkbox"/> (check box) Master Bill of Lading: with attached underlying Bills of Lading					
<b>CUSTOMER ORDER INFORMATION</b>									
CUSTOMER ORDER NUMBER		# PKGS	WEIGHT	PALLET/SLIP (CIRCLE ONE)		ADDITIONAL SHIPPER INFO			
				Y N					
				Y N					
				Y N					
				Y N					
				Y N					
				Y N					
				Y N					
				Y N					
				Y N					
GRAND TOTAL									
<b>CARRIER INFORMATION</b>									
<b>HANDLING UNIT</b>		<b>PACKAGE</b>		<b>WEIGHT</b>	<b>H.M. (X)</b>	<b>COMMODITY DESCRIPTION</b> <small>Commodities requiring special or additional care or attention in handling or stowing must be so marked and packaged as to ensure safe transportation with ordinary care.</small>		<b>LTl ONLY</b>	
<b>QTY</b>	<b>TYPE</b>	<b>QTY</b>	<b>TYPE</b>					<b>NMFC #</b>	<b>CLASS</b>
GRAND TOTAL									
Where the rate is dependent on value, shippers are required to state specifically in writing the agreed or declared value of the property as follows: "The agreed or declared value of the property is specifically stated by the shipper to be not exceeding _____ per _____."						COD Amount: \$ _____ Fee Terms: Collect: <input type="checkbox"/> Prepaid: <input type="checkbox"/> Customer check acceptable: <input type="checkbox"/>			
<b>NOTE Liability Limitation for loss or damage in this shipment may be applicable. See 49 U.S.C. § 14706(c)(1)(A) and (B).</b>									
<p>RECEIVED, subject to individually determined rates or contracts that have been agreed upon in writing between the carrier and shipper, if applicable, otherwise to the rates, classifications and rules that have been established by the carrier and are available to the shipper, on request, and to all applicable state and federal regulations, the property described above, in apparent good order, except as noted (contents and condition of contents of package unknown) marked, consigned, and destined as shown below, which said carrier agrees to carry to destination, if on its route, or otherwise to deliver to another carrier on the route to destination.</p> <p>Unless the shipper and carrier have an effective prior written agreement to use another bill of lading, it is mutually agreed, as to all motor carriage performed by each carrier of all or any of said property over all or any portion of said route to destination, and as to each party at any time interested in any or all of said property that every service to be performed hereunder shall be subject to all the terms and conditions of the Uniform Bill of Lading set forth in the National Motor Freight Classification 100-X and successive issues. The shipper hereby certifies that he is familiar with all the terms and conditions of the said bill of lading, including those on the back thereof, and the said terms and conditions are hereby agreed to by the shipper and accepted for himself and his assigns.</p>						The carrier shall not make delivery of this shipment without payment of freight and all other lawful charges.			
						Shipper Signature _____			
<b>SHIPPER SIGNATURE / DATE</b> <small>This is to certify that the above named materials are properly classified, packaged, marked and labeled, and are in proper condition for transportation according to the applicable regulations of the DOT.</small>						Trailer Loaded: <input type="checkbox"/> By Shipper <input type="checkbox"/> By Driver		Freight Counted: <input type="checkbox"/> By Shipper <input type="checkbox"/> By Driver/pallets said to contain <input type="checkbox"/> By Driver/Pieces	
						Pallets Returned _____ Straps Returned _____ Order Complete <input type="checkbox"/> This Delivery: Partial <input type="checkbox"/> Final <input type="checkbox"/>			
						<b>CARRIER SIGNATURE / PICKUP DATE</b> <small>Carrier acknowledges receipt of packages and required placards. Carrier certifies emergency response information was made available and/or carrier has the DOT emergency response guidebook or equivalent documentation in the vehicle.</small>			

## Thermal Labels

Shown below are labels generated from a thermal printer.

DERIDDER YOUR COMPANY ADDRESS		15 LBS 1 OF 1
CITY NY 14787		
<b>SHIP TO</b>	KNAPP PHONE: A/P 36558 ONE KNAPP CENTER BROCKTON MA 02402	
	(420) SHIP TO POSTAL CODE  (420) 02402	
<b>UPS GROUND</b>		
TRACKING # 1Z 1J3 721 03 1000 3335		
		
0-0-0		300491
MOORETTI Pw3 0-0		

15 LBS 2 of 2	
<b>SHIP FROM</b>	NEALS 2141 CIVIC DR. SUITE 11 SOUTHFIELD MI 48076
<hr/>	
<b>SHIP TO</b>	ATTN: MARCY WEINSTEIN JEWELERS OF STERLING 3963 17 MILE RD. STERLING HEIGHT MI 48310
<hr/>	
Fed. Exp.	
<hr/>	
300214 - 758850	



Custom Forms

Plantrol Systems can provide whatever custom forms you may need for your shipping system. Shown below is an example of a custom shipping label.

THIS END UP

From

To

NO. OF PARTS	FORM NAME/NUMBER	QUANTITY THIS CARTON
FROM	NUMBERED TO	CARTON NUMBER
		O F
CUSTOMER ORDER NO.	OUR ORDER NO.	FACTORY JOB NO.

109 1/91

STORE IN COOL DRY AREA

# REPORTS

You can access Plantrol's Omni Ship report and other shipping documents through the Report Menu within Omni, and also from the Report Menu in your UBL SH system. In addition to the Shipping Detail Report, which is normally run as part of your UPS end of day process, Harvey's CPS system makes additional reports available.

## REPORT MENU – VISUAL

Click on REPORTS – All Available Reports. Select the report you wish to print from the list at top left. Input the requested shipment and job information. Select the printer, and click PRINT.

The screenshot shows a software interface titled "Reports". On the left, a list of reports is displayed: "SH Omni Ship Report", "SH Print Carton Labels", and "SH Print PackList". The "SH Omni Ship Report" is highlighted. Below this list, there are fields for printer selection (a dropdown menu showing "HP Laserjet 4si Downstairs"), a "QUEUE" field with a radio button for "@LPT" and another for "Default Que", a "COPIES" field, and a "SPECIAL FORM" field. At the bottom left, there is a checkbox for "PRINT IN BATCH" and two buttons: "PRINT" and "CANCEL". On the right side of the interface, there are several input fields: "Report Date" (12-30-99), "Shipment Transaction Number" (999999999), "Starting Shipment Date" (12-29-99), and "Ending Shipment Date" (12-29-99). Above these fields are two buttons: "Start Values" and "End Values". Below the date fields, there are fields for "FAX NUMBER", "FAX TO", and "FAX FROM". At the bottom right, there is a checkbox for "SCREEN OUTPUT". An arrow points from the "Ending Shipment Date" field to the text box below the screenshot.

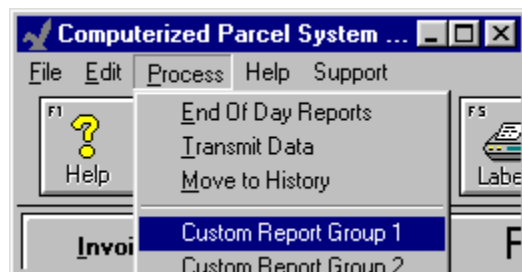
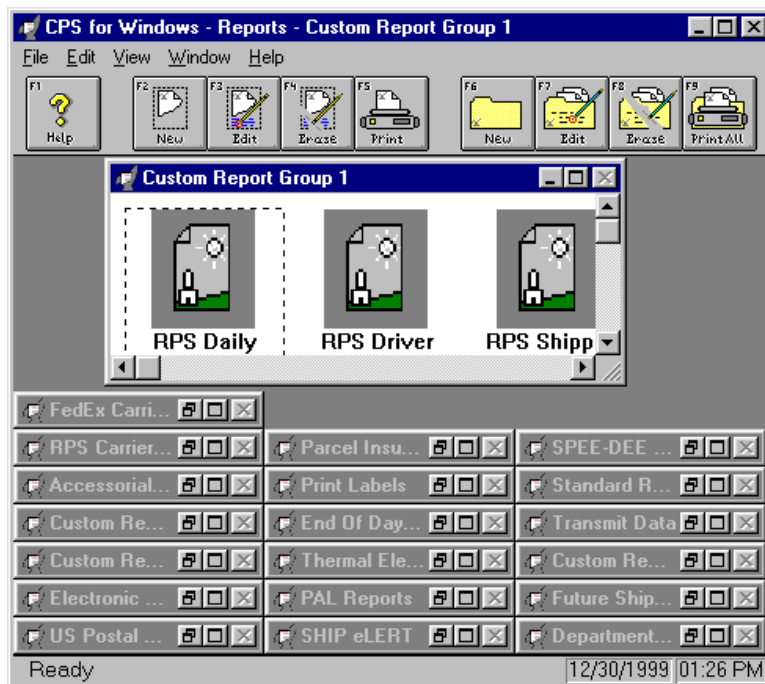
The Omni Ship report for all shipments made 12-29-99 is about to be printed.

## REPORT MENU – UBL

You can print the Omni Ship report, and most other customized shipping documents from a UBL dumb terminal by accessing the User Defined Reports menu from the SH system menu.

## HARVEY REPORTS

The Harvey CPS for Windows system contains various reports that can be run as desired. Access these reports by clicking on Start → Programs → CPS for Windows → Reports. Open the report group folder you want to work with by restoring it from its minimized state. You can drag report icons into other folders to group them appropriately.



**NOTE:** Clicking on the Custom Report Group 1 from the CPS Process Menu will generate the reports in the report folder shown above. You can also double click a report icon to run a report.

## How to Print a Shipping Detail Report from History

This report is useful if the End of Day Shipping Detail Report is lost. Once you have moved the day's shipments to history, you must use this option to run the report.

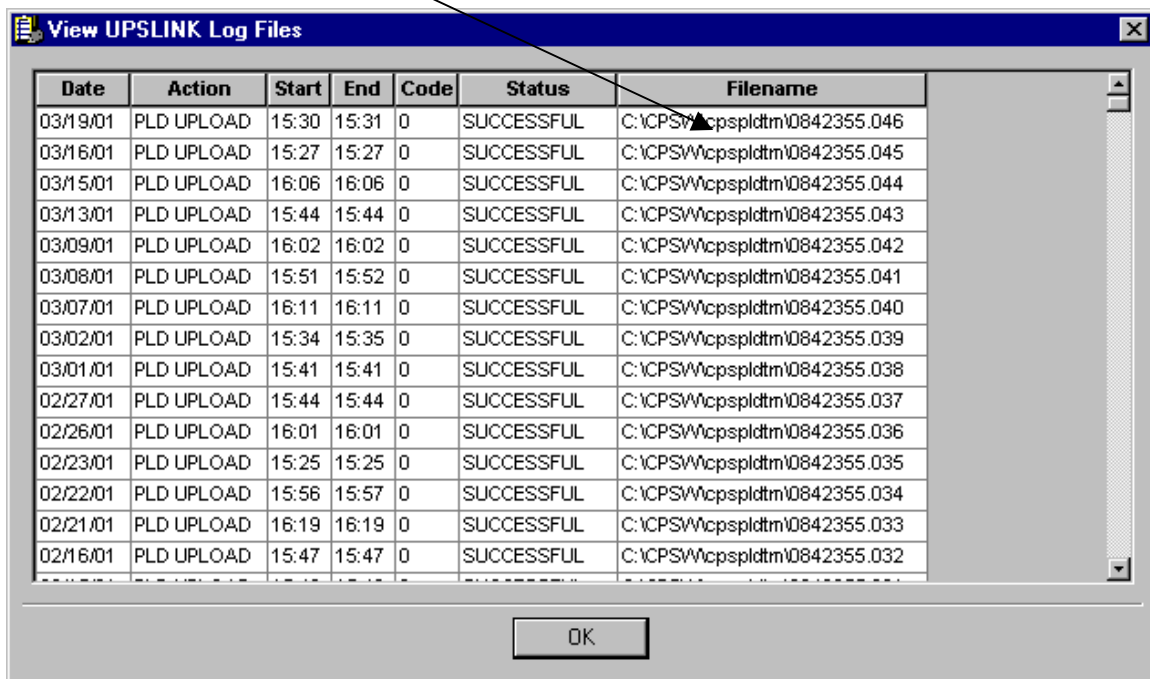
Note: If the day's upload file was corrupted, this report will not run successfully. In that case, you may use the "UPS Manifest" report which is found on the SH system report menu. Although the UPS Manifest report is not as complete as the Shipping Detail Report, UPS will accept it as a replacement for the upload file if necessary.

1. Find the upload file name.

Click Start → Programs → CPS for Windows → View UPSLINK Log Files.

Locate the Upload file for the day needed. Write down the number of the day's filename.

Click OK.



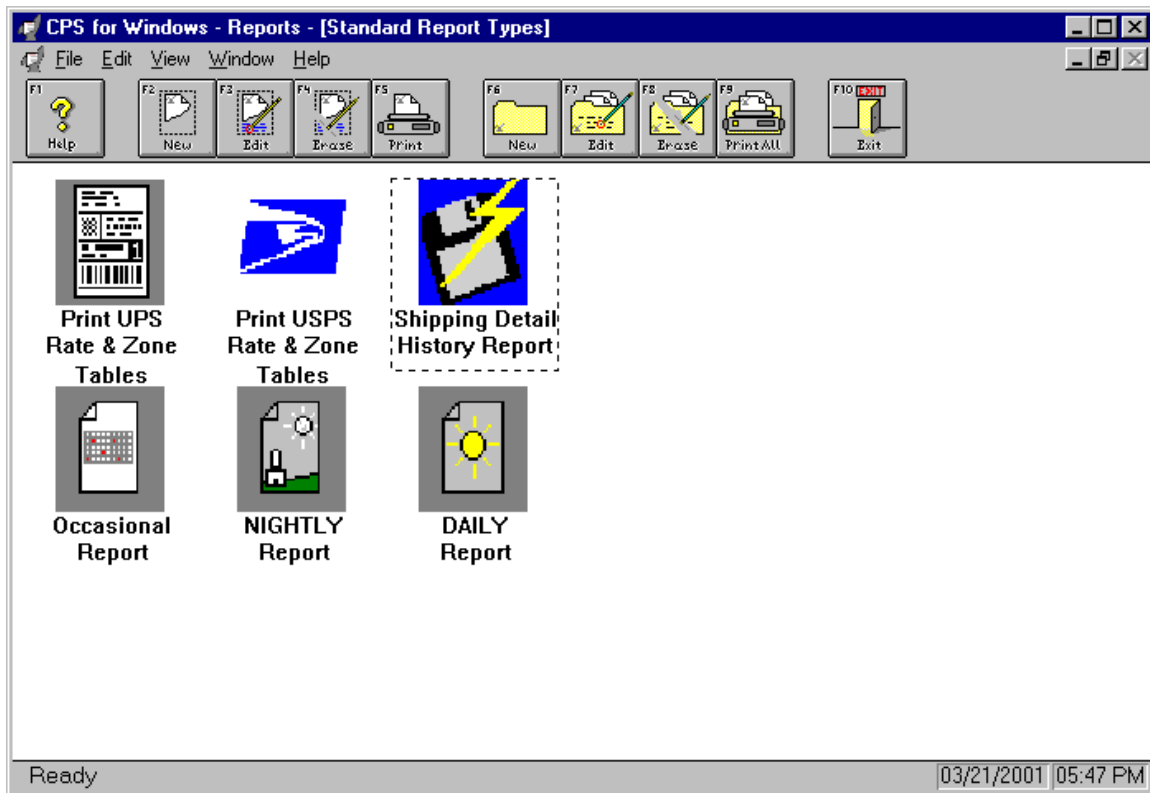
Date	Action	Start	End	Code	Status	Filename
03/19/01	PLD UPLOAD	15:30	15:31	0	SUCCESSFUL	C:\CPS\Wcpspldtm\0842355.046
03/16/01	PLD UPLOAD	15:27	15:27	0	SUCCESSFUL	C:\CPS\Wcpspldtm\0842355.045
03/15/01	PLD UPLOAD	16:06	16:06	0	SUCCESSFUL	C:\CPS\Wcpspldtm\0842355.044
03/13/01	PLD UPLOAD	15:44	15:44	0	SUCCESSFUL	C:\CPS\Wcpspldtm\0842355.043
03/09/01	PLD UPLOAD	16:02	16:02	0	SUCCESSFUL	C:\CPS\Wcpspldtm\0842355.042
03/08/01	PLD UPLOAD	15:51	15:52	0	SUCCESSFUL	C:\CPS\Wcpspldtm\0842355.041
03/07/01	PLD UPLOAD	16:11	16:11	0	SUCCESSFUL	C:\CPS\Wcpspldtm\0842355.040
03/02/01	PLD UPLOAD	15:34	15:35	0	SUCCESSFUL	C:\CPS\Wcpspldtm\0842355.039
03/01/01	PLD UPLOAD	15:41	15:41	0	SUCCESSFUL	C:\CPS\Wcpspldtm\0842355.038
02/27/01	PLD UPLOAD	15:44	15:44	0	SUCCESSFUL	C:\CPS\Wcpspldtm\0842355.037
02/26/01	PLD UPLOAD	16:01	16:01	0	SUCCESSFUL	C:\CPS\Wcpspldtm\0842355.036
02/23/01	PLD UPLOAD	15:25	15:25	0	SUCCESSFUL	C:\CPS\Wcpspldtm\0842355.035
02/22/01	PLD UPLOAD	15:56	15:57	0	SUCCESSFUL	C:\CPS\Wcpspldtm\0842355.034
02/21/01	PLD UPLOAD	16:19	16:19	0	SUCCESSFUL	C:\CPS\Wcpspldtm\0842355.033
02/16/01	PLD UPLOAD	15:47	15:47	0	SUCCESSFUL	C:\CPS\Wcpspldtm\0842355.032

OK

2. Locate the History Report icon.

Click Start → Programs → CPS for Windows → Reports.

Maximize the "Standard Reports" folder.



3. Run the report.

Double click the “Shipping Detail History Report” icon.

Input the pickup record number you noted in step 1, omitting the numbers after the decimal point.

Input the upload date.

Click OK.

Close Reports by clicking the x.

## STANDARD REPORTS

The two reports shown here are standard and most shippers run them daily as part of their close out process.

### Omni Ship Report

This report lists all of the shipments processed for a day, or a range of days.

OmniShip Shipping Report										Page: 3						
Shipment Trans. No	Sh Job No.	3b Line	Acct. Item	Shipper	Company Name	Package Merchandise Description 1	Date Shipped	Car.	Zip Code	UPS Zone	Quantity Shipped	No. Ctrs	Total Shipped	Weight	Charge	
102169 OE	81342	1	884566	USPO - BELKNAP BUSINESS FORMS	LOOKHEED MARTIN MICHAUD SP SYS	LOCKHEED MARTIN CHECK REQUEST	10-14-99	UPS	70129	6	5000	5	133	59.62	0	
102170 OE	81416	1	365000	DOODGE GRAPHIC PRESS INC	DOODGE GRAPHIC PRESS INC	IMO ENROLLMENT FORMS FOR NYS EMP	10-14-99	NP	13501		25400	21	625		0	
102171 OE	81641	1	884524	USPO - BELKNAP BUSINESS FORMS	USPO-RAPID RESPONSE CENTER	PREMIUM REFUND CHECK, CHK-004	10-14-99	UPS	20403	103	50	1	2	16.90	0	
102172 OE	81484	1	430750	FORMS IN A KINK	ROCHESTER CARPENTER FUND	LETTERHEAD	10-14-99	UPS	14624	2	8250	6	166	38.62	0	
102173 OE	81593	1	477250	GRAPHICS EXCHANGE	MARYLAND PROT ADMINISTRATION	MPA GATE PERMIT	10-14-99	NP	21222		43200	27	648		0	
102174 MS					STERLING SUMMER INC	INV 81200	10-14-99	UPS	14150		1	1			0	
102175 MS		1		Belknep Business Forms, Inc.	STERLING SUMMER INC	INV 81200	10-14-99	UPS	14150	2	1	1	1	3.33	0	
102176 MS		1		VSR CONTINUOUS INC	COGAR PRINTING	VSR ARTWORK	10-14-99	UPS	21220-4109	3	1	1	1	3.43	0	
102177 MS		1		Belknep Business Forms, Inc.	BRADEN SUTPHIN	MISC.	10-14-99	UPS	14227	2	1	1	1	3.33	0	
102178 MS		1		Belknep Business Forms, Inc.	PIONEER BUSINESS FORMS INC	INV 81406	10-14-99	UPS	44092	2	1	1	1	3.33	0	
102179 MS		1		Belknep Business Forms, Inc.	USPO	PROOF 458-846/25147 458-847/25148	10-14-99	UPS	20401	L103	1	1	1	12.90	0	
102180 MS		1		Belknep Business Forms, Inc.	PRECISION DATA PRODUCTS	PROOF 81649	10-14-99	UPS	07009	L103	1	1	1	12.90	0	
102181 MS		1		Belknep Business Forms, Inc.	PERFECT FORMS & SYSTEMS	PROOF 81650	10-14-99	UPS	11787-2841	L103	1	1	1	12.90	0	
													745178	444	11107	872.89

# UPS Shipping Detail Report

The UPS shipping detail report lists all the UPS packages included in the day's shipping, including charges, service level, and any accessororial services applied.

S H I P P I N G   D E T A I L   R E P O R T										ACCOUNT NUMBER: NY 123-721	
Plantrol Systems, Ltd. 100 Bourne Street Westfield NY 14787										PICKUP RECORD NUMBER: 4452531 82 3	
DATE SHIPPED: 02-25-2003										PAGE: 2	
INVOICE NUMBER/ PAYMENT	TRACKING ID#	CONSIGNEE NAME/ADDRESS	CITY COUNTRY	ST	ZIP CODE	ZO NE	WT R CHARGES E (COST) S	COD/ INS	ACCESSORIAL LIST		
00656369-002 BILL: SHIPPER REF 1: 229489	1Z4819050320877406 CARRIER: UPS REF 2:	Clampco Products Inc. 1743 Wall Road	Wadsworth	OH	44281	2	28 6.91 ( 6.91)				
00656369-002 BILL: SHIPPER REF 1: 229489	1Z4819050320877406 CARRIER: UPS REF 2:	Clampco Products Inc. 1743 Wall Road	Wadsworth	OH	44281	2	28 6.91 ( 6.91)				
00656369-003 BILL: SHIPPER REF 1: 229489	1Z4819050320877415 CARRIER: UPS REF 2:	Clampco Products Inc. 1743 Wall Road	Wadsworth	OH	44281	2	28 6.91 ( 6.91)				
00656369-003 BILL: SHIPPER REF 1: 229489	1Z4819050320877415 CARRIER: UPS REF 2:	Clampco Products Inc. 1743 Wall Road	Wadsworth	OH	44281	2	28 6.91 ( 6.91)				
00656369-004 BILL: SHIPPER REF 1: 229489	1Z4819050320877424 CARRIER: UPS REF 2:	Clampco Products Inc. 1743 Wall Road	Wadsworth	OH	44281	2	25 6.46 ( 6.46)				
00656369-004 BILL: SHIPPER REF 1: 229489	1Z4819050320877424 CARRIER: UPS REF 2:	Clampco Products Inc. 1743 Wall Road	Wadsworth	OH	44281	2	25 6.46 ( 6.46)				
00656400-001 BILL: SHIPPER REF 1: 229356	1Z4819050320877200 CARRIER: UPS REF 2:	BASSETT HEALTHCARE ATTN: PO#95137 26 GROVE ST	COOPERSTOWN	NY	13326	4	26 8.24 ( 8.24)				
00656400-001 BILL: SHIPPER REF 1: 229356	1Z4819050320877200 CARRIER: UPS REF 2:	BASSETT HEALTHCARE ATTN: PO#95137 26 GROVE ST	COOPERSTOWN	NY	13326	4	26 8.24 ( 8.24)				
00656400-001 BILL: SHIPPER REF 1: 229356	1Z4819050320877200 CARRIER: UPS REF 2:	BASSETT HEALTHCARE ATTN: PO#95137 26 GROVE ST	COOPERSTOWN	NY	13326	4	26 8.24 ( 8.24)				
00656400-001 BILL: SHIPPER REF 1: 229356	1Z4819050320877200 CARRIER: UPS REF 2:	BASSETT HEALTHCARE ATTN: PO#95137 26 GROVE ST	COOPERSTOWN	NY	13326	4	26 8.24 ( 8.24)				
00656400-001 BILL: SHIPPER REF 1: 229356	1Z4819050320877200 CARRIER: UPS REF 2:	BASSETT HEALTHCARE ATTN: PO#95137 26 GROVE ST	COOPERSTOWN	NY	13326	4	26 8.24 ( 8.24)				
00656400-002 BILL: SHIPPER REF 1: 229356	1Z4819050320877219 CARRIER: UPS REF 2:	BASSETT HEALTHCARE ATTN: PO#95137 26 GROVE ST	COOPERSTOWN	NY	13326	4	26 8.24 ( 8.24)				
00656400-002 BILL: SHIPPER REF 1: 229356	1Z4819050320877219 CARRIER: UPS REF 2:	BASSETT HEALTHCARE ATTN: PO#95137 26 GROVE ST	COOPERSTOWN	NY	13326	4	26 8.24 ( 8.24)				
00656400-002 BILL: SHIPPER REF 1: 229356	1Z4819050320877219 CARRIER: UPS REF 2:	BASSETT HEALTHCARE ATTN: PO#95137 26 GROVE ST	COOPERSTOWN	NY	13326	4	26 8.24 ( 8.24)				

# Carrier Summary Page

Plantrol Systems, Ltd.  
100 Bourne Street  
Westfield NY 14787

CARRIER SUMMARY AND ACCESSORIAL LEGEND

ACCOUNT NUMBER: NY 123-721  
PICKUP RECORD NUMBER: 4452531 82 3

DATE SHIPPED: 02-25-2003

PAGE: 8

Carrier	Shpmnts	Bill Weight	Shipping Charges	Shipping Cost	Total Charges	Total Cost
UPS	98	2423.000	715.53	715.53	727.78	727.78
TOTAL	98	2423.000	715.53	715.53	727.78	727.78

## Accessorial List Legend

For All Carriers:  
COD - Collect On Delivery  
OS - Oversize

INS - Insurance

UPS Carrier Specific:  
ADD - Additional Handling  
AOD - Acknowledgement Of Delivery  
DW - Dimensional Weight  
OS2 - Oversize 2  
SIG - Signature Required  
1PU - 1 Try Pick-Up

ADS - Adult Signature Required  
EXT - Int'l Extended Area  
SAT - Saturday Delivery  
SN - Shipper Notification  
3PU - 3 Try Pick-Up

USPS Carrier Specific:  
BAL - Balloon Rate  
DC - Delivery Confirmation  
RR - Return Receipt  
SC - Signature Confirmation  
SH - Special Handling

C - Certified  
RD - Restricted Delivery  
RRM - Return Receipt for Merchandise  
SCW - Signature Confirmation w/Waiver of Signature

FedEx Ground Carrier Specific:  
ADD - Additional Handling  
CT - Call Tag

AOD - Acknowledgement Of Delivery  
POD - AutoPOD

# Declared Value Page

Plantrol Systems, Ltd.  
100 Bourne Street  
Westfield NY 14787

SHIPPING DETAIL DECLARED VALUE REPORT

ACCOUNT NUMBER: NY 123-721  
PICKUP RECORD NUMBER: 4452531 82 3

DATE SHIPPED: 02-25-2003

PAGE: 9

INVOICE	DECLARED VALUE	CHARGE UNITS	CHARGES
00656525-001	300	2	0.70
00656525-001	300	2	0.70
00656525-001	300	2	0.70
00656525-001	300	2	0.70
00656525-001	300	2	0.70
00656526-001	400	3	1.05
00656526-001	400	3	1.05
00656526-001	400	3	1.05
00656526-001	400	3	1.05
00656526-001	400	3	1.05
00656527-001	300	2	0.70
00656527-001	300	2	0.70
00656527-001	300	2	0.70
00656527-001	300	2	0.70
00656527-001	300	2	0.70
TOTAL	5000	35	12.25



# INQUIRIES

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Omni Ship provides various ways to look up information. Depending on your needs, you may choose to use the Process Shipment window, the Shipment Look-up found on the Inquiry Menu, the inquiries found in your OE or FM systems or Harvey's Daily Entry window.

WHICH INQUIRY METHOD SHOULD I USE?	
If you need to know	Use this method
All the shipments made on a date	Shipment Look-up – by date
Tracking numbers for a shipment	Shipment Look-up from a PC, or OE or FM inquiry from a terminal
If a carton was sent for Saturday delivery	Shipment Look-up – Tracking tab
Shipment information for a carton sent today	Shipment Look-up
All the shipments made for a job	Shipment Look-up from a PC, or OE or FM inquiry from a terminal
Tracking information for a UPS shipment	Shipment Look-up, to find shipment number, Then reference section on Tracking

## SHIPMENT LOOKUP

To use the Shipment Look-up, click the Inquiry Menu → Shipment Look-up. You can look up shipments by order or release number, ship date, or shipment number. The check boxes at the left allow you to filter the types of shipments you wish to view. Click on the various tabs to view different types of information about the shipment.

### How to use

1. Input either the Order, Release, Ship Date, or Shipment Number
2. Click the check boxes for which statuses to include.
3. Click Find

**BELKNAP OMNI SHIP - [Shipment Inquiry]**

File Edit User Inquiries Reports Tools Window

Shipment Number: Find (F1) Next (F2) Change (F3) Add (F4) Delete (F5) Save (F6) Cancel (F11) Exit (F10)

Date Shipped: Shipment Number

Status: Shipment Number

**Look-up** Shipment Job or Release Items Package Summary Packages Missing Numbers

Status to Include:

- ☒ Unprocessed
- ☒ Processed
- ☒ Updated

Order/Release:

Order: 79365

Release: Find

Ship Date: Find

Shipment Number: Find Clear

Shipment Number	Date Shipped	Status	Shipped To	City	State	Postal Code	No. of Cartons	Charges	Weight	Shipped Via
100666	9/7/99	Updated	WILLSON INTERNATIONAL INC	TONAWANDA	NY	14150	7	\$27.93	70	UPS Ground
100680	9/7/99	Updated	WILLSON INTERNATIONAL INC	TONAWANDA	NY	14150	4	\$15.96	40	UPS Ground
100899	10/11/99	Unprocessed					0	\$0.00	0	UPS Ground
100907	10/11/99	Updated	WALLINGFORD PRINTING	WALLINGFORD	CT	06492	6	\$58.26	90	UPH 3 Day Select
100908	10/11/99	Unprocessed					0	\$0.00	0	UPS Ground
100910	11/24/99	Processed	WILLSON INTERNATIONAL INC	TONAWANDA	NY	14150	1	\$21.75	10	FEX Standard Overnight
100911	11/24/99	Updated	WILLSON INTERNATIONAL INC	TONAWANDA	NY	14150	4	\$115.00	55	FEX Priority Overnight
100912	10/11/99	Updated	WILLSON INTERNATIONAL INC	TONAWANDA	NY	14150	2	\$0.00	30	New Penn

CAPS NUM INS

**NOTE:** IN the example above, Job number 79365 has been inputted in the Job Number field. All shipments for this job are displayed. To view a specific shipment, click in the record selector row at the left of the shipment, or enter the number in the shipment number field.

## Shipment detail information

**ALLIED OMNI SHIP**

File Edit User Inquiries Reports Tools Window

Shipment Number: 300478 Date Shipped: 12-28-99 Status: Processed

Find (F1) Next (F2) Change (F3) Add (F4) Delete (F6) Save (F8) Cancel (F11) Exit (F10)

**Shipment Inquiry**

Look-up **Shipment** Job or Release Items Package Summary Tracking Missing Numbers

Shipment Number: 300478 Date Shipped: 12-28-99 Ship To Address: \*\* GENERAL DYNAMICS/ELEC BOAT

Freight Terms (P/C/A): A PPD/Add Status: Processed Attention: MARY

Billing Option: Shipper: UPS Zone: 4 Street Addr: C/O ALLIED WAREHOUSE

Billing Account Number: RI 021-231 Line 2: 30 MARTIN STREET EAST

City, St, Zip: CUMBERLAND RI 02864 Country: UNITED STATES Tax Area: 1

Total Carrier charges: 29.95 Total Weight: 100 Number of Packages: 5 Shipped Via & Service Level: UPS Ground

Ship From Address: ALLIED BUSINESS DOCUMENTS 333 BUCKLIN STREET PROVIDENCE RI 02907

Saturday Delivery: Saturday Pickup: Ship Notification: Call Tag:

Shipping Instructions:

F.O.B. Plant: N Inside Delivery: Station Id: DEANNEW Shipped by Name: DEAN

Viewing 12/28/99 1:12:54 PM 12/28/99 1:13:47 PM dean Record: 207 CAPS NUM INS

**ALLIED OMNI SHIP**

File Edit User Inquiries Reports Tools Window

Shipment Number: 300478 Date Shipped: 12-28-99 Status: Processed

Find (F1) Next (F2) Change (F3) Add (F4) Delete (F6) Save (F8) Cancel (F11) Exit (F10)

**Shipment Inquiry**

Look-up Shipment Job or Release Items Package Summary **Tracking** Missing Numbers

Shipment No.	Job Type	Job or Release	Job No. Suffix	Line Item	Seq. No.	Shipment Pkg. No.	Weight	Carton Quantity	Package Tracking Number	First Number	Last Number	Missing Nos.	Package Charges	Dim. Lgth	Dim. Width
300478	OE	184419		1	1	1	20	300	1Z1237210310020076				5.99		
300478	OE	184419		1	1	2	20	300	1Z1237210310020076				5.99		
300478	OE	184419		1	1	3	20	300	1Z1237210310020076				5.99		
300478	OE	184419		1	1	4	20	300	1Z1237210310020076				5.99		
300478	OE	184419		1	1	5	20	300	1Z1237210310020076				5.99		

Viewing 12/28/99 1:12:54 PM 12/28/99 1:13:47 PM dean Record: 207 CAPS NUM INS

## OE AND FM INQUIRIES

Standard shipment inquiries are available for your OE or FM systems. These are look-ups by Order or Release number and are designed for the use of Customer Service representatives.

U/Gi Universal Graphical Interface. - DEVELOP.UGI

File Edit Preferences View Transfer Help

STATUS INQUIRY

Order #: DE- 81855

Account No.: 748890

Distributor PO: BOBBI CALAMAN

Current CC: 999

Date: 11-10-99

Order #: DE- 81855

Tran. #	Seq	ShipDate	Shipped To	City	St	Via.	Ctns	Wgt.	Costs
103456	<u>1</u>	11-10-99	GROFF TRACTOR &	MECHANICSBUR	PA	UPS	1	26	7.16
103457	<u>2</u>	11-10-99	GROFF TRACTOR &	MECHANICSBUR	PA	UPS	2	39	12.27
103459	<u>3</u>	11-10-99	GROFF TRACTOR &	MECHANICSBUR	PA	UPS	2	39	12.27

Cre: 10-18-99 10:19:15 Mod: 11-11-99 10:37:45 AAMIZ [Chg] Rec #: 17577

Ready 8.11 16:12:47

Start Inbo... Plan... U/G... Document1 - Microsoft Word 4:12 PM

U/Gi Universal Graphical Interface. - DEVELOP.UGI

File Edit Preferences View Transfer Help

STATUS INQUIRY

Order #: DE- 81855

Account No.: 748890

Distributor PO: BOBBI CALAMAN

Current CC: 999

Date: 11-10-99

Order #: DE- 81855

Ctn#	Tracking Number	Wght	Qty	First No.	Type	Cost
<u>1</u>	<u>121253560310042797</u>	<u>30</u>	<u>1200</u>	<u>0</u>	<u>S</u>	<u>7.39</u>
2	121253560310042804	9	350	0	S	4.08

Cre: 10-18-99 10:19:15 Mod: 11-11-99 10:37:45 AAMIZ [Chg] Rec #: 17577

Ready 8.3 16:15:08

Start Inbo... Plan... U/G... Doc... 2 S... 4:15 PM

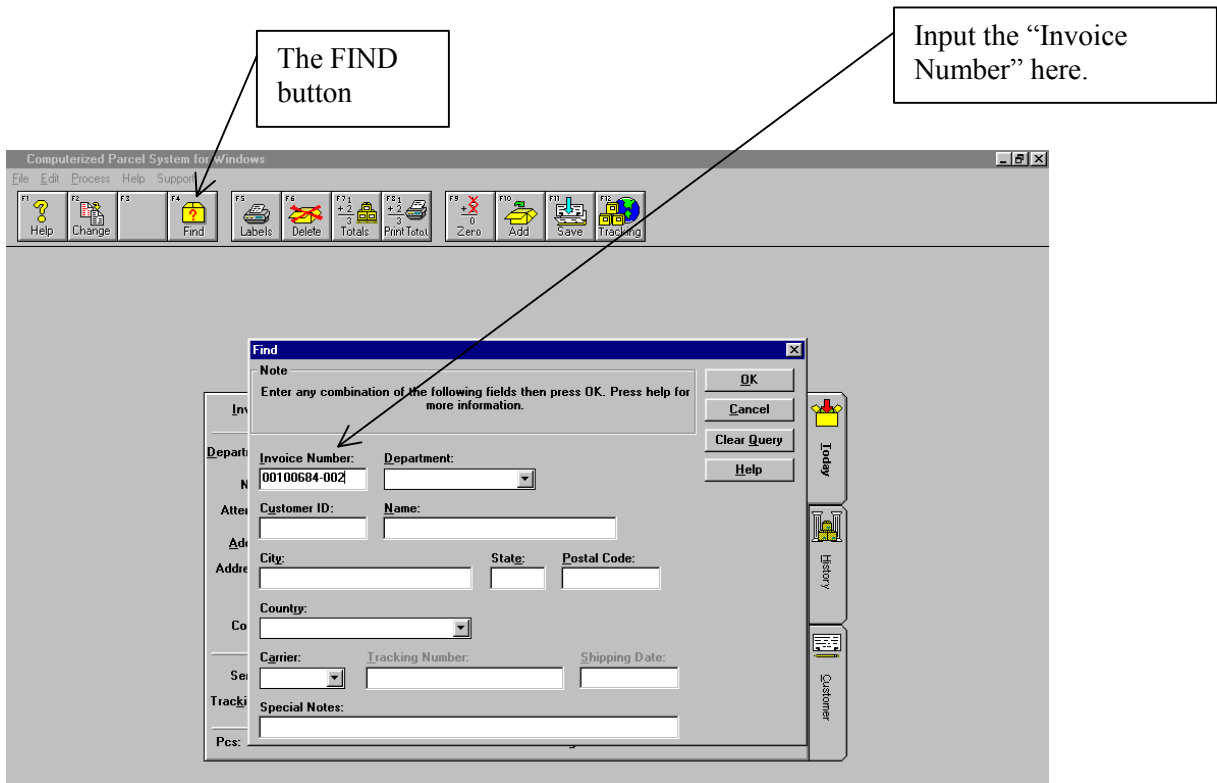
## CPS DAILY ENTRY LOOK-UP

Remember that only shipments that use the CPS interface to look up rates will be found in the CPS system. It should not be necessary to look up information directly in the CPS system except when trouble shooting a problem.

1. To work in CPS directly, close the “process shipments” window, and click on CPS on the tool bar to open the “Daily Entry” window.
2. You must be in FIND mode. If in ADD mode, click CANCEL (F12) until FIND is displayed.
3. Click on the “History” tab to find past shipments, or the “Today” tab to find shipments not yet moved to history. Click the FIND button on the tool bar, input the “Invoice Number” and click OK. You can find a specific carton number, or find the shipment and then use the arrow keys to page through all the cartons in the shipment. Use the conversion table below to determine the CPS “invoice number” you need.

**CPS uses “Invoice Numbers” to identify the cartons. The Omniship numbers relate to the CPS numbers as shown below.**

Conversion Table		
OMNI SHIP		CPS
Shipment Number	Carton number	Invoice number
100105	1	00100105-001



Shipment 001262, carton 1 is displayed below.

**Computerized Parcel System for Windows**

File Edit Process Help Support

F1 Help F2 Change F3 F4 Find F5 Labels F6 Delete F7 1 + 2 3 Totals F8 1 + 2 3 Print Total F9 + 0 Zero F10 Add F11 Save F12 Tracking

**Find Parcels** Harvey Software

Invoice: 00001262-001

Department: Customer ID: Actual Wt (lbs.): 25.000

Name: ATTN: VICTORIA HALLAK Bill Weight: 25.0

Attention: MILLION AIR TETERBORO Dim Weight: 0.000

Address: CODE: U2809201-1620 Total: \$6.61

Address 2: 485 INDUSTRIAL AVE.

City: TETERBORO State: NJ Postal Code: 07608

Country: Phone:

Service: UPS: Commercial Ground (3) Use Printed

Tracking #: 121237210310002283

☐ COD ☐ Saturday  
☐ Confirm ☐ Invoice  
☐ Value ☐ Waybill

Pcs: 35 Wt: 570.0 ActWt: 516.005 Charges: 614.11 Costs: 614.11

F10=Add Home=First End=Last PgUp=Prev. PgDn=Next 118/214 NUM 12/30/1999 05:15 PM

# RATE SHOPPING

---

Need a quick comparison of rates for a package? The BestWay Calculator can be used to compare rates for UPS, FXG, Federal Express, and US Postal Service with a couple of clicks. Various service levels and additional services can be compared. Of course, any special rate agreements you may have will not be taken into account.

There are two ways to access the BestWay Calculator: from the Items tab to rate a package on an existing shipment, or in a stand-alone mode. Examples are shown here.

**CAUTION!** Rate shopping is based on single cartons. If you select UPH, the total shipment must be above the minimum weight for UPS Hundredweight service to receive the estimated rate.

## HOW TO USE RATE SHOPPING

There are two ways to rate shop.

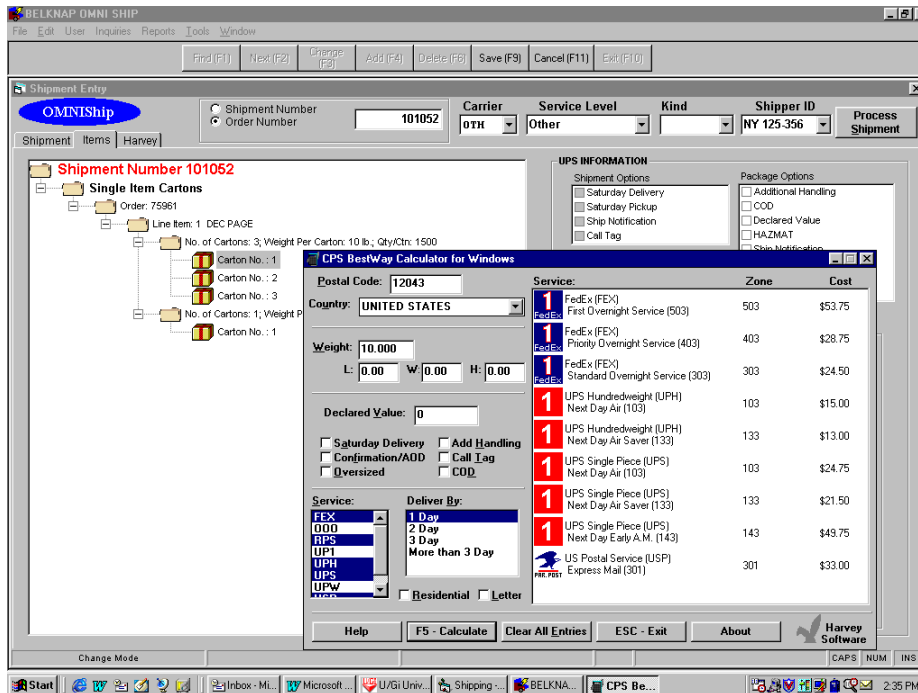
### **Rate Shop for an existing shipment**

1. Click the ITEMS tab.
2. Click on the carton you want to rate shop
3. Click on the Rate Shop button.

The BestWay Calculator will open, and the selected package's weight and destination zip code will be imported.

4. Click on the desired Service (or carrier) and Deliver By (time frame) to narrow your choices.
5. Use the buttons at the bottom to navigate.

**NOTE:** In the example below, all the next day delivery options have been displayed for carton no.1 of this shipment.



## Rate Shop Independently

The BestWay Calculator can also be accessed directly by:

1. Selecting Start → Programs → CPS for Windows → BestWay Calculator.
2. Input the zip code and package weight, and select the Services and Delivery By times you want to compare.

**NOTE:** In the example below is a comparison of RPS and UPS rates for a 50 lb. Package to zip code 20410, where a service time of two or more days is acceptable



**CPS BestWay Calculator for Windows**

Postal Code:

Country:

Weight:

L:  W:  H:

Declared Value:

☐ Saturday Delivery    ☐ Add Handling  
☐ Confirmation/AOD    ☐ Call Tag  
☐ Oversized    ☐ COD

Service:     Deliver By:   
      
      
      
      
      
   

☐ Residential    ☐ Letter

Service:	Zone	Cost
Roadway Package System (RPS) Continental U.S. Ground (3)	3	\$10.64
UPS Hundredweight (UPH) Commercial Ground (3)	3	\$10.43
UPS Single Piece (UPS) Commercial Ground (3)	3	\$10.64
Roadway Package System (RPS) RPS 2 Day Guaranteed (73)	73	\$32.51
UPS Hundredweight (UPH) 2nd Day Air (203)	203	\$42.50
UPS Hundredweight (UPH) 2nd Day Air A.M. (243)	243	\$47.50
UPS Single Piece (UPS) 2nd Day Air (203)	203	\$38.25
UPS Single Piece (UPS) 2nd Day Air A.M. (243)	243	\$42.75
Roadway Package System (RPS) RPS 3 Day Guaranteed (33)	33	\$28.50
UPS Hundredweight (UPH) 3 Day Select (303)	303	\$27.35

Help    **F5 - Calculate**    Clear All Entries    ESC - Exit    About   

## HOW TO CREATE A SHORTCUT ON YOUR DESKTOP

You can create a shortcut to the BestWay Calculator on your desktop. To do this follow the steps below.

1. Click on Start → Programs → CPS for Windows.
2. Right click on “BestWay Calculator”
3. Select “Create shortcut.”

A new copy of the icon will appear at the bottom of the program list.

4. Click this icon to select it.
  5. Hold the left mouse button down as you drag the icon to your desktop.
- You can double click this copy of the icon to run the Rate Shopping program.



**BestWay Calculator**

# TRACKING

Shipments can be tracked using the carrier's tracking number. Most carriers offer tracking via phone or web sites. UPS shipments may be tracked directly through Harvey if you have an Internet connection.

## HOW TO TRACK UPS SHIPMENTS THROUGH CPS

To track UPS shipments through Harvey follow the steps below. You must have an open Internet connection. The same process may be used for FEX and FXG shipments.

1. To work in CPS directly, close the "process shipments" window, and click on CPS on the tool bar to open the "Daily Entry" window.
2. You must be in FIND mode. If in ADD mode, click CANCEL (F 12) until FIND is displayed.
3. Click on the "History" tab. Click the FIND button on the tool bar, input the "Invoice Number" and click OK. You can find a specific carton number, or find the shipment number and then use the arrow keys to page through all the cartons in the shipment. Use the conversion table in Section 10.3 to determine the CPS "invoice number" you need.
4. When the carton you wish to track is shown, click TRACK (F10).

Visual Plantrol Shipping System

File Edit User Inquiries Reports Tools Window

Find (F1) Next (F2) Change (F3) Add (F4) Delete (F5) Save (F9) Cancel (F11) Exit (F10)

SHIPMENT ENTRY

OMNISHIP

Shipment Number Order Number

Carrier ups Service Level Ground Kind NY 123 721 Shipper ID

Process Shipment

SHIPMENT | ITEMS | HARVEY

Help Other Invoice Find Copy Detail Call Tag Confirm COD Track Clear

Invoice: 00100420-001

Department: Customer ID:

Name: Ultra Pak Ted Steffen

Address: 1600 S. 92 Place Building I

City: SEATTLE State: WA Postal Code: 98108

Country: Phone:

Notes:

Service: UPS:2nd Day Air Letter (L208)

Tracking #: 1Z1237210210006549

Manifest #: 084235520 Date: 09/28/99 Value: 0.00

Call Tag Received ADD/Confirmation Received COD Received

Actual Weight: 1.000

Bill Weight: 1.0

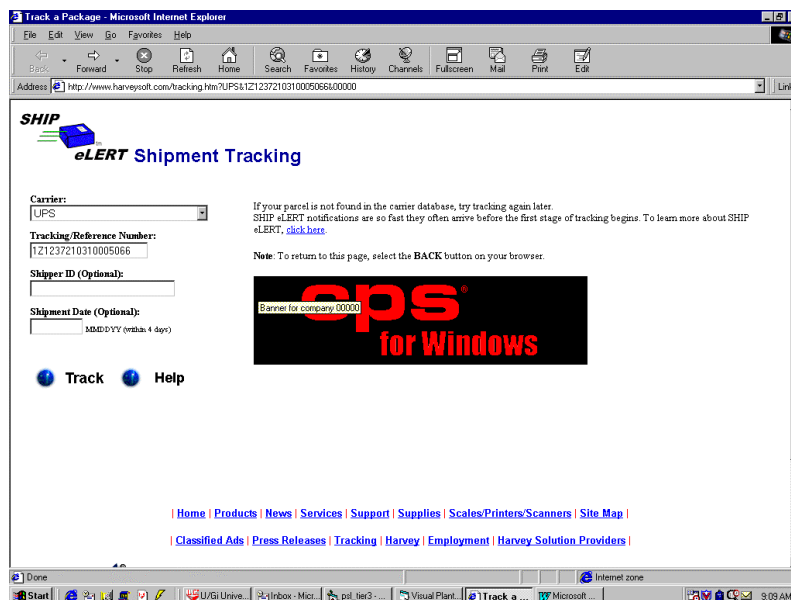
Dim Weight: 0.000

Total: \$7.50

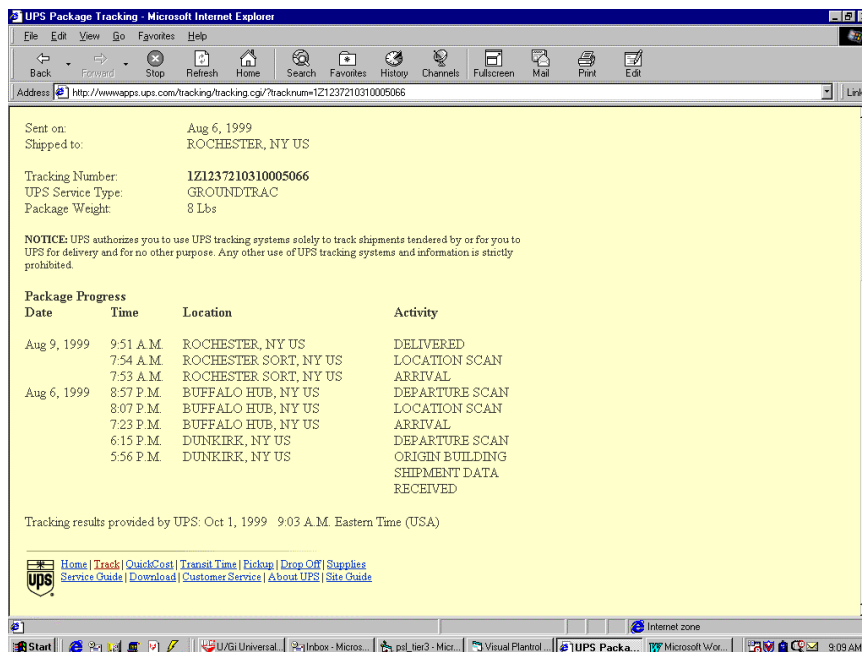
Printed: ☐ COD ☐ Standard ☐ Custom ☐ Other

F10=Add Home=First End=Last PgUp=Prev. PgDn=Next 85/86 NUM 10/01/1999 09:07 AM

5. Your package tracking number is now displayed on the CPS Ship eLert website.
6. Click the TRACK button.



7. UPS tracking information is displayed, and can be printed using your web browser.



# SYSTEM MAINTENANCE

---

## CHECK SYSTEM FILES

At the end of each period, it is important to check the use of the system files to be sure none are reaching a critical size. If the percent used exceeds 85% on any file, consider purging the file, or contact Plantrol support if the file needs to be expanded. The exception to this is the ARGLB file, which will always be at 100%. Files must also be “optimized” to maintain optimal response time.

- From the UBL SH system, select 10 - System Manager Menu, then 10 – File Utilization Analysis.
- Be sure all users are out of the Accounts Receivable system before starting the next process.
- Still in the System Manager Menu, select 11 – Index File Optimization. Select all files, and answer “Y” to “Proceed?”

## HOW TO ADD OR DELETE A CARRIER

You can change your carrier choices at any time. If the carrier will not have rates calculated by the CPS system – for example, an LTL carrier or local delivery service – the carrier just needs to be added or deleted from the list of names Omni Ship recognizes by following the steps below.

If CPS will calculate rates for the new carrier, setup steps must be also performed in CPS. This only needs to be done if the carrier was not set up during the original installation. Contact Plantrol support for assistance if this is needed.

In order for UPS functionality to work correctly, the carriers “UPS”, “UPH”, and “UPW” must be in your list of choices, “UPS”, “UPH”, and “UPW” must also appear on both the 1st and 2nd lines of the text field. DO NOT DELETE THESE! The three letter codes for FEX, FXG, USP, and SPD must also appear in the same way if these carriers are used.

1. In your UBL system, at the SH system manager menu, choose “Data Dict - STDFM”. (Or – at a Unix prompt, type “GOTO SH”, and then at the prompt type “Run “DDSTDFM”)
2. Select item “8 – AutoText File Maintenance.”
3. FIND variable name “SVIA\$.” You can FIND NEXT through your current list of carrier choices.
4. With one of the current choices on the screen, press Shift ADD to create a new record. (To delete the carrier, press the DELETE key.)

5. If adding a carrier, use the ENTER key to move the cursor to the “Alpha Flag” field, and input the new carrier code. This will be what the user inputs or selects to identify the carrier. *If the carrier will be used by the CPS system, the code must be the same three letters that CPS uses in its list of carrier choices, and the three-letter code must also appear on line 2.*
6. Use the ENTER key to move the cursor to the “Text” field. Input the carrier

U/GI Universal Graphical Interface - Y2K2 UGI

File Edit Preferences View Transfer Help

AUTOMATIC TEXT FILE MAINTENANCE

Variable Name: SVTAS

Alpha Flag: (NL If None) EM

Text 1 2 3 4 5 6 7 8

123456789012345678901234567890123456789012345678901234567890

**Emery Worldwide**

Numeric Value 1: \_\_\_\_\_

Numeric Value 2: \_\_\_\_\_

Numeric Value 3: \_\_\_\_\_

name.

7. Press the STOP key to end.

The new carrier will now appear on your list of choices.

If the carrier also needs to be setup within CPS, use the Harvey setup program on all PC's.  
Contact Plantrol support for assistance if needed.

## HANDLING CHARGES

You can add per-carton and/or per-shipment handling charges to the carrier's fee if you choose.

**Handling charges for UPS** are maintained in the SH system global file, as shown below.

GLOBAL FILE MAINTENANCE			
Company Number: <u>1</u>		Company Name <u>Plantrol Systems LTD</u>	
Last Transaction Number Used: <u>107756</u>		System Interfaces	
Last Batch Number Used: _____		OE <u>Y</u>	
Last Job Number Used: _____		FM <u>N</u>	
IKEY: <u>1</u>		TX <u>N</u>	
Return Address: <u>Plantrol System LTD</u>		- UPS Service Charges -	
<u>100 Bourne Street</u>		Per Carton : <u>0.20</u>	
_____		DCR per Carton: <u>1.00</u>	
_____		COD per Carton: <u>1.00</u>	
<u>Westfield NY 14787</u>		Per Shipment : <u>0.75</u>	
UPS Account # : <u>NY 123-456</u>			
Current Ship Date: <u>9- 6-02</u>			
Cre: 2- 5-96 10:16:59 Mod: 9- 6-02 10:47:42 frank [ <u>Chg</u> ] Rec #: 1 013			

- DCR per Carton = handling charge for delivery confirmation
- COD per Carton = handling charge for COD

**Handling charges for other carriers** are maintained in the auto text file for the specific carrier and can be added or edited at any time by following the procedure below.

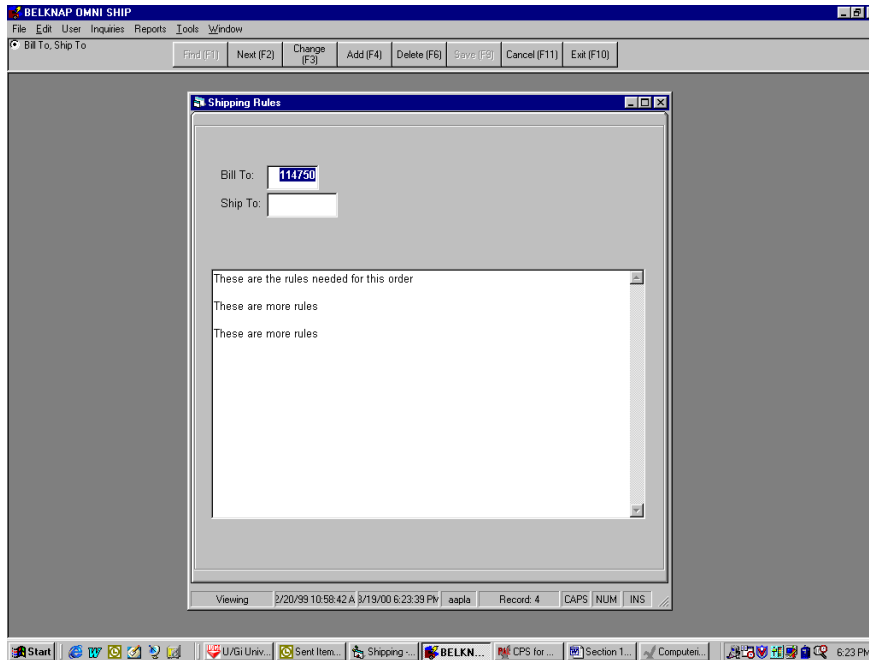
1. In your UBL system, at the SH system manager menu, choose "Data Dict - STDFM".  
(Or – at a Unix prompt, type "GOTO SH", and then at the prompt type "Run "DDSTDFM")
2. Select item "8 – AutoText File Maintenance."
3. FIND variable name "SVIAS", and the alpha flag of the carrier you want to add charges to.
4. Use the CHANGE key to add or change the values in Numeric Value 3 (package charge) and/or Numeric Value 4 (shipment charge.)
5. Press the STOP key to end.

AUTOMATIC TEXT FILE MAINTENANCE							
Variable Name:		<u>SVIAS</u>					
Alpha Flag: (NL If None)		<u>FXG</u>					
Text	1	2	3	4	5	6	7
1234567890123456789012345678901234567890123456789012345678901234567890							
<b>FXG</b>							
Numeric Value 1:		_____		T4010\$:		████████	
Numeric Value 2:		_____		T5012\$:		_____	
Numeric Value 3:		<u>15</u>		T621\$:		_ T631\$: _ T641\$: _	
Numeric Value 4:		<u>50</u>					
Cre: 9-29-07 23:08:35    Mod: 9-29-07 26:20:44    AAPAK    [ <u>Chg</u> ]    Rec #: 7    002							

- Numeric Value 3 = Amount to Add per Carton to Shipping Costs
- Numeric Value 4 = Amount to Add per Shipment to Shipping Costs NOTE: On shipments of multiple jobs, this amount will be added to the cost of the first job entered.
- These values are measured in cents. In the above example, Numeric Value 3 = \$.15

## MAINTAINING THE SHIPPING RULES FILE

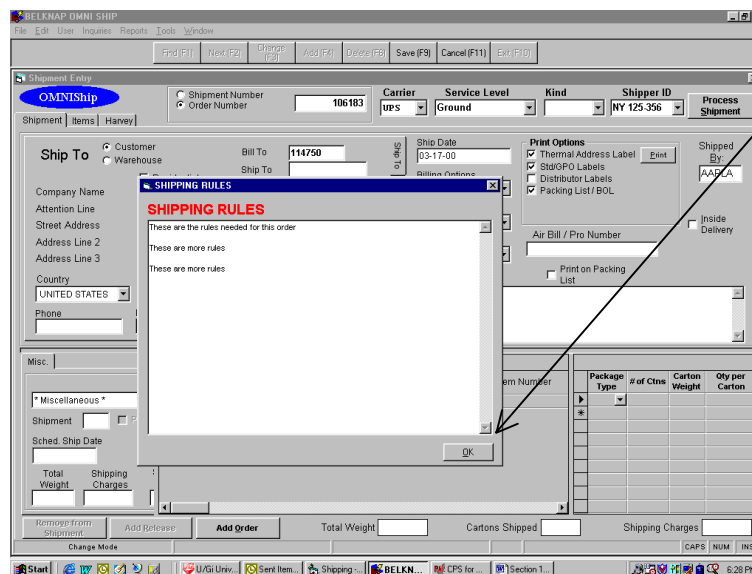
The Shipping Rules file allows you to set shipping requirements for each account, as shown below. Access the shipping rules file from the User menu. Use the Tool Bar function keys to FIND, FIND NEXT, CHANGE, ADD, DELETE, SAVE or CANCEL. Once you have made an entry for an account number, the Shipping Rules will pop up each time you ship an order for that account. The user must click OK to remove the rules from view. The rules are still accessible by clicking the “shipping rules” tab.



Rules have been set for account number 114750, as shown above.

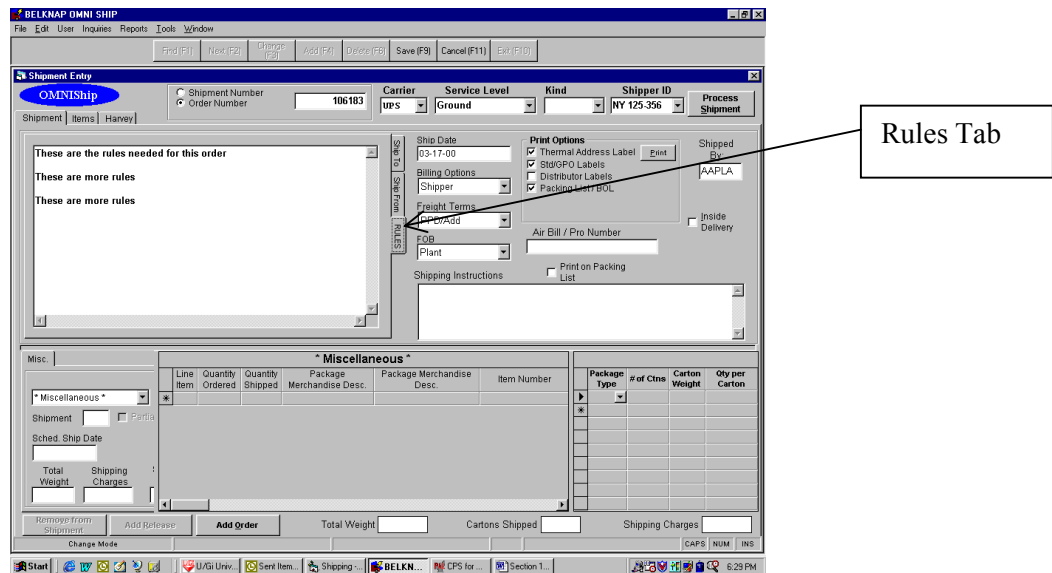
The rules pop up when a shipment is entered for this account as shown below.

Click OK to see the rules tab.



Click OK  
for the rules  
to disappear.





## UPDATING THE SOFTWARE

Both Harvey and Plantrol continue to develop their software as needs arise. As part of your support agreement, you will receive the current version of CPS on CD once a year or whenever carrier rates have changed. Plantrol will provide a new version of Omni whenever significant enhancements have occurred. Procedures to install these updates follow.

### How To Install Harvey CPS and Rate Updates

Carrier rates included in Omni are part of the Harvey CPS component of Omni Ship. A CD will be sent to you if rates have changed, or as part of your annual update. Instructions will be sent with the CD; additional information may be communicated directly from Plantrol, if needed. Enhancements, if available may be installed between annual upgrades, by retrieving the new version from the Harvey support website at <http://www.hsilink.com>. You will need your Harvey support serial number to log on.

Install the update when you have completed your day's shipping. Best results are seen if the CPS daily file is empty.

Make a backup of your current CPS daily file. (C:\CPSW\cps.dbf)

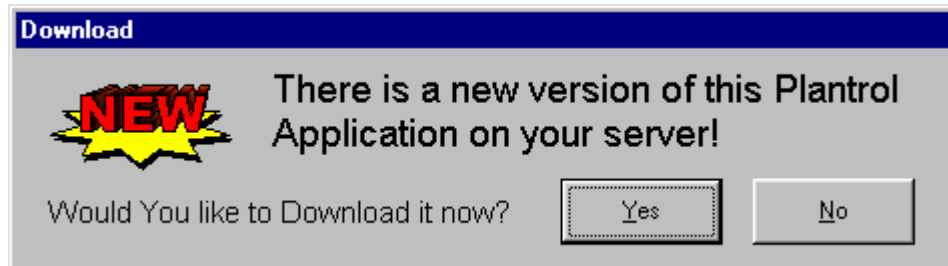
Close Omni and all other programs on all connected shipping PC's.

Follow the provided instructions to install the upgrade on the master PC first, followed by the slave PC's.

If you have "custom carriers" set up in CPS, you must update these rates separately.

## How to Install Omni Upgrades

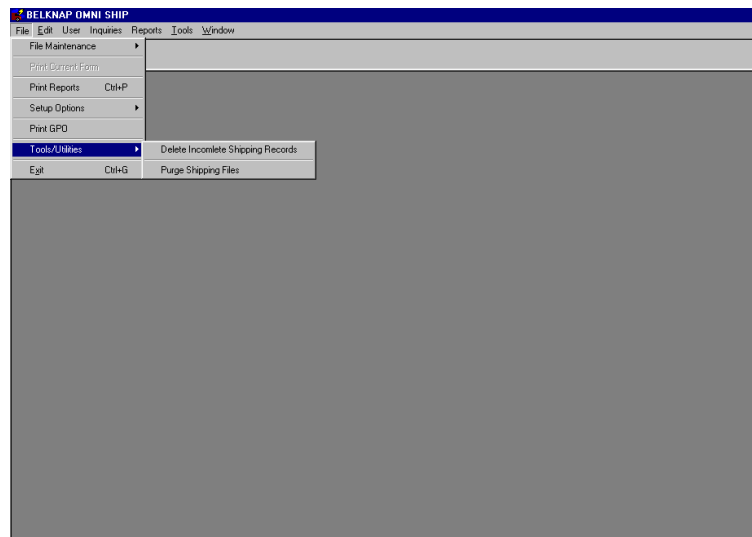
If a new version of Omni has been provided to you, it will be installed on your server by Plantrol support and you will be notified by phone, fax or email. The next time you open Omni on a shipping PC, you will see the message below.



To download the new version, click “Yes”. To keep working and download later, click “No.” Since each PC has its own copy of the Omni software, each PC can decide when to install the new version.

## SYSTEM UTILITIES

System Utilities are provided to delete historic shipping records. Access these programs by clicking on File → “Tools/Utilities. Also included in this section is information on the “Shipping Rules” file.



## Deleting Incomplete Shipments

“Incomplete shipments” are usually records created when a shipment is partially entered and then aborted without having been properly deleted. This utility provides a way to delete shipment records where no package or package summary information was ever entered. It is recommended that this program be run on an occasional basis to clean out these “leftovers”.

**To Delete Incomplete Shipments, follow the steps below:**

1. Select “Delete Incomplete Shipping Records” from the File – Tools/Utilities Menu.
2. Shipments are displayed which have no package or package summary files.
3. Before clicking the DELETE button, click to uncheck any shipments you do NOT want to delete.
4. To print the list, click the PRINT button. At the “print preview” window, click the Printer Icon or File – Print. Close the “print preview” window.
5. Click the DELETE button to delete the checked shipments
6. Click OK when you see the “Deletion Complete” message box.

SHIPMENT NUMBER	SHIPMENT DATE	JOBS	DELETE
106021	02-21-2000	67549	<input checked="" type="checkbox"/>
106036	02-25-2000	35303	<input checked="" type="checkbox"/>
106051	02-24-2000	64986	<input checked="" type="checkbox"/>
106055	02-24-2000	65000	<input checked="" type="checkbox"/>
106099	02-25-2000	78648	<input checked="" type="checkbox"/>
106105	02-25-2000	64783	<input checked="" type="checkbox"/>
106119	02-25-2000	67483	<input checked="" type="checkbox"/>
106137	06-01-2001	67483	<input checked="" type="checkbox"/>
106152	03-06-2000		<input checked="" type="checkbox"/>
106153	03-06-2000		<input checked="" type="checkbox"/>
106154	03-06-2000		<input checked="" type="checkbox"/>

PRINT CANCEL DELETE

## Purging the Files

The Omni SH system files and the Harvey CPS history file can be purged using the utilities provided. We recommend that you make purging the files a routine monthly process. Having large files will slow down some processes and inquiries.

**To Purge The Omni Files follow the steps below:**

1. Select File – Tools/Utilities – Purge Shipping Files
2. Select the purge date

The default is set to keep a minimum of three months of processed and updated shipments. You may change the date to keep more history if you wish. You can also choose to purge Unprocessed Shipments. (Remember that shipments that are entered and have had labels created, but are not yet shipped are “Unprocessed”.)

3. Click PURGE.
4. Click OK when you see the Purge Complete box.
5. Click QUIT.
6. After purging, optimize SH system files. On the SH system manager menu, select option 2.

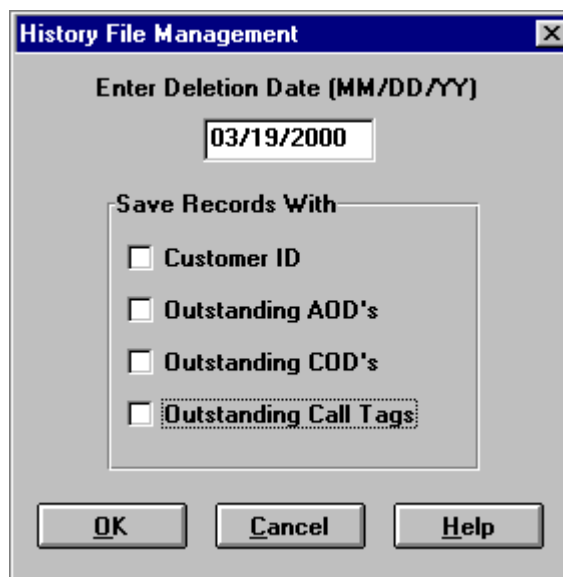


**To Purge The Harvey CPS History File follow the steps below:**

1. Close Omni on all stations
2. On the master PC click Start → Programs →CPS for Windows →Tools.



3. Click F8 – History.

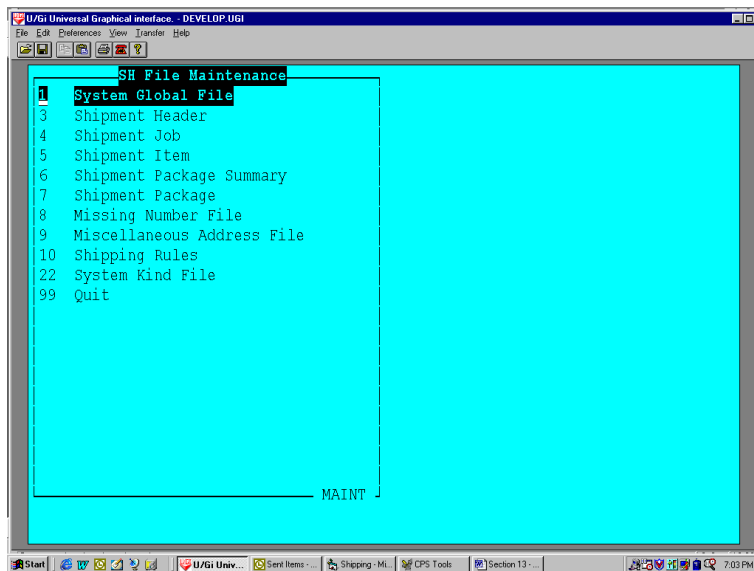


8. Input the purge date. BE CAREFUL! The default date will purge all history records!
9. Click OK.
10. Click OK when you see the “Delete from history file complete!” box.
11. Click EXIT.

## SYSTEM FILES AND CODES

Behind the scenes, Omni Ship has files and codes to organize the data and simplify processing. Here is an overview of these to assist the system manager with troubleshooting problems.

To access these files in your UBL system, at the SH system manager menu, choose, “Standard File Maintenance”. Or, at a Unix prompt, type GOTO SH, and then at the prompt type Run “STDFM.



## File Structure

FILE NAME	DESCRIPTION
GLOBAL FILE	System parameters, interfaces, UPS handling fees
SHIPMENT HEADER	Information that pertains to the entire shipment
SHIPMENT JOB	Information that pertains to the entire order or release
SHIPMENT ITEM	Information pertaining only to the specific line item on the order or release
SHIPMENT PACKAGE SUMMARY	A package summary record is created for each group of identical packages
SHIPMENT PACKAGE	A record is created for each individual package
MISSING NUMBER FILE	Contains the missing number info entered at shipping
MISCELLANEOUS ADDRESS FILE	Not currently used or supported
SHIPPING RULES	Rules set up by the user for specific accounts (see section 13.32)
SYSTEM KIND FILE	Maintained only by Plantrol

## Service Level Codes

### Carrier = UPS

Next Day Air	1
2 <sup>nd</sup> Day Air	2
Ground	3
2 <sup>nd</sup> Day Air A.M.	7
3 <sup>rd</sup> Day Select	12
Next Day Air Saver	13
Next Day Air Early AM	15

### Carrier = UPH

Next Day Air	1
2 <sup>nd</sup> Day Air	2
Ground	3
2 <sup>nd</sup> Day Air A.M.	7
3 <sup>rd</sup> Day Select	12
Next Day Air Saver	13

### Carrier = FXG

US Ground	44
Hawaii Ground	44
Hawaii Ground Outer Islands	44
Alaska Ground	44
Alaska Rural Ground	44
Canada Ground	44

### Carrier = FedEx

Priority Overnight	1
2 <sup>nd</sup> Day Service	2
Express Saver Service	8
Standard overnight	13
First Overnight	15

### Carrier = UPW

Express	66
Express Plus	54
Expedited	67
Standard (Canada only)	68



## Billing Option Codes

### Carrier = UPS or UPH

Shipper	1
Receiver	2
Third Party	3
Consignee	C
American Express	4
Master Card	5
Visa	6
Check	7

### Carrier = FXG

Shipper	1
Receiver	4
Third Party	3
Collect	2

### Carrier = FEX

Sender	1
Recipient	2
Third Party	3
Credit Card	4
Cash/Check	5

## Status Codes

### Shipment Header File

Unprocessed	0
Non Harvey Processed	1
Harvey Processed	2
Processed & Updated	3

## UPS FUEL SURCHARGE INSTRUCTIONS (OPTION)

UPS added a 1.25% fuel surcharge to shipping charges effective 8/7/00. Plantrol offers a program called RateChg, which adds the surcharge to the UPS rates.

RateChg allows you to create a new rate schedule based on whatever percentage you enter. RateChg does not change the Published Rates file. It uses existing CPS functionality to add the surcharge percentage to the shipping cost. This process involves the following steps:

1. Back-up current files.
2. Check current rates.
3. Run the RateChg program.
4. Modify the AutoText file.
5. Rebuild the indexes and check new rates.
6. Process shipments, reconcile and update, as usual.

### 1. Back-up Current Files

1. Before making any changes, back-up the published rates files (UPSZP.DBF & UPWZP.DBF). Make sure that OmniShip and CPS are closed and do the following:
2. Double-click the My Computer icon on your desktop.
3. Navigate to C:\cpsw.
4. Right-click the **UPSZP.DBF** file and select Copy.
5. Right-click in the white area of the same window and select Paste. A file named **Copy of UPSZP.DBF** appears.
6. Right-click the **Copy of UPSZP.DBF** file and select Rename.
7. Change the name to **origUPSZP.DBF**.
8. Repeat steps 3-6 for the **UPWZP.DBF** file to create the **origUPWZP.DBF** file.

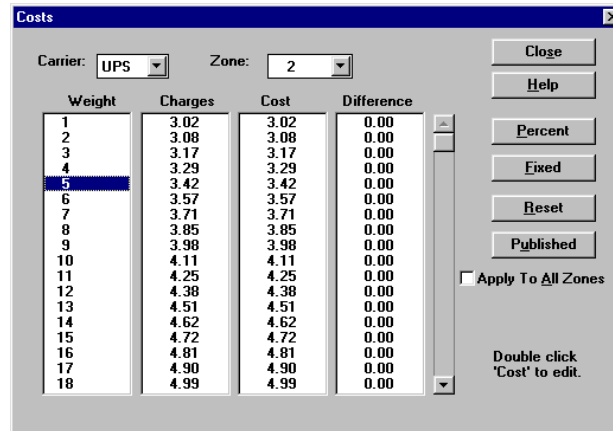
#### A Note Regarding Upgrades:

Before installing any upgrade involving a rate change, it is important that you convert the rate changer back to 0. After installing the upgrade, re-enter the fuel surcharge adjustment.

## 2. Check Current Rates

It's a good idea to see what the current rates are so that when you create the new rate schedule, you can be sure the change was correct. To check the current rates:

1. Launch the CPS Tools program by opening Start → Programs → CPS for Windows → Tools.
2. Select Edit → Costs. The following rates appear:



Weight	Charges	Cost	Difference
1	3.02	3.02	0.00
2	3.08	3.08	0.00
3	3.17	3.17	0.00
4	3.29	3.29	0.00
5	3.42	3.42	0.00
6	3.57	3.57	0.00
7	3.71	3.71	0.00
8	3.85	3.85	0.00
9	3.98	3.98	0.00
10	4.11	4.11	0.00
11	4.25	4.25	0.00
12	4.38	4.38	0.00
13	4.51	4.51	0.00
14	4.62	4.62	0.00
15	4.72	4.72	0.00
16	4.81	4.81	0.00
17	4.90	4.90	0.00
18	4.99	4.99	0.00

3. Change the carrier to **UPW** to check the international rates.

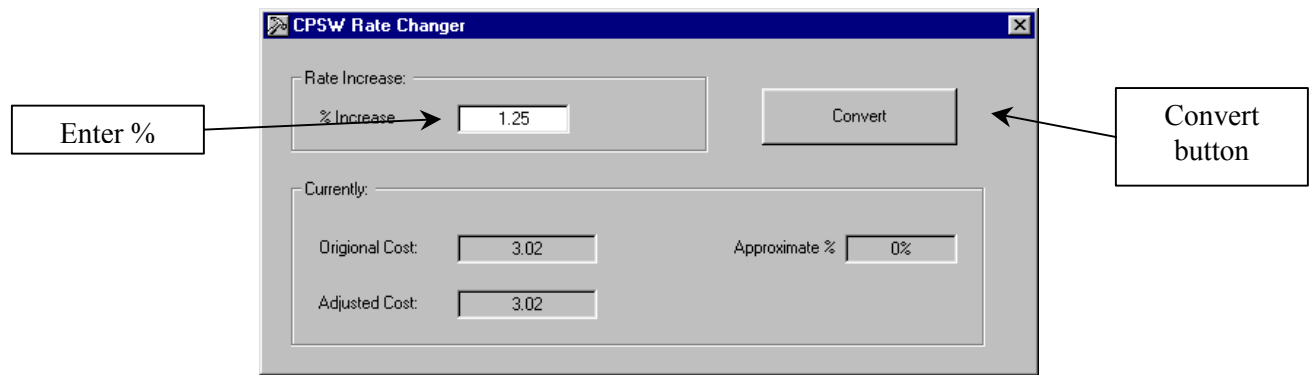
## 3. Run The RateChg Program

After downloading the new version of the shipping application, find the RateChg.exe program on your desktop. Make sure OmniShip and CPS are closed before running this program. To run this program:

1. Double-click the RateChg icon:



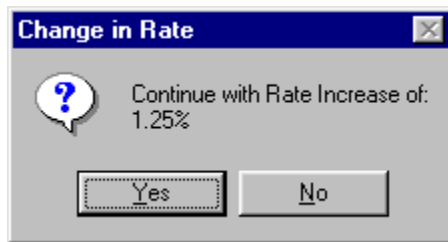
2. The CPSW rate changer window appears:



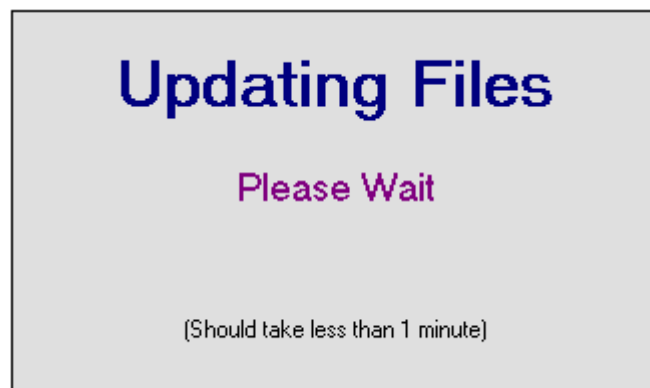
3. Enter 1.25 in the % Increase box and click the Convert button.

**Note:** If UPS discontinues the fuel surcharge, enter a '0' here to go back to using the original rates.

4. Select Yes to continue:



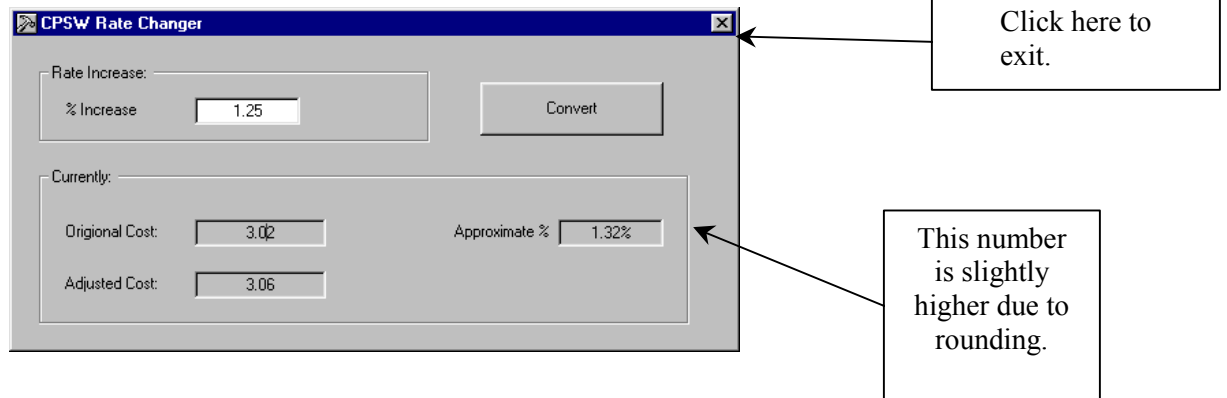
An update message appears:



5. Click OK to each message:



The CPSW Rate Changer now shows the increase in the Adjusted Cost box. The Approximate % displays the actual percentage applied after rounding:



6. Click the  in the upper right corner of the window to exit.

#### 4. Modify The AutoText File.

You now need to modify the AutoText file so the surcharge is applied to UPH records during reconciliation. To modify the AutoText file:

1. In your UBL system, at the SH system manager menu, choose “Data Dict - STDFM”. (Or – at a Unix prompt, type “GOTO SH”, and then at the prompt type “Run “DDSTDFM”)
2. Select AutoText File Maintenance (Item 8).
3. FIND the SVIA\$ variable and enter UPH in the Alpha Flag field.
4. Press the F3 key to Change the file.
5. Enter “1.25” on the third line of the text field in column 3. Use Enter and the arrow keys to get to the correct position:

These messages vary by system

AUTOMATIC TEXT FILE MAINTENANCE

Variable Name: SVIA\$  
 Alpha Flag: (NL If None) UPH

Text	1	2	3	4	5	6	7	8
1234567890123456789012345678901234567890123456789012345678901234567890								
UPS	Hundredweight							
UPH								
			1.25					

Numeric Value 1: \_\_\_\_\_  
 Numeric Value 2: \_\_\_\_\_  
 Numeric Value 3: \_\_\_\_\_  
 Numeric Value 4: \_\_\_\_\_

Cre: 7-28-99 12:38:12    Mod: 7-31-00 17:06:23    FRANK [\_\_\_\_]    Rec #: 70    004

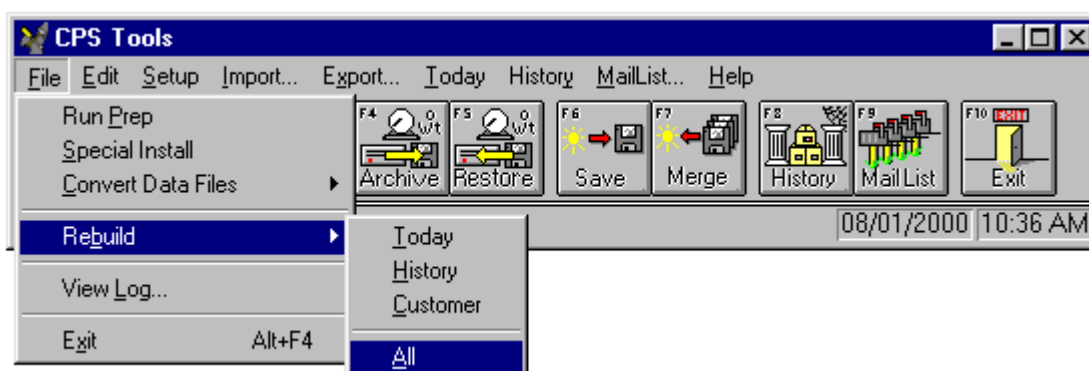
Enter 1.25 in Column 3

6. Repeat steps 3,4 and 5 using UPS in place of UPH.
7. Press the Stop key (F10) to save.

### 5. Rebuild the indexes in CPS:

To rebuild indexes in CPS follow the steps below.

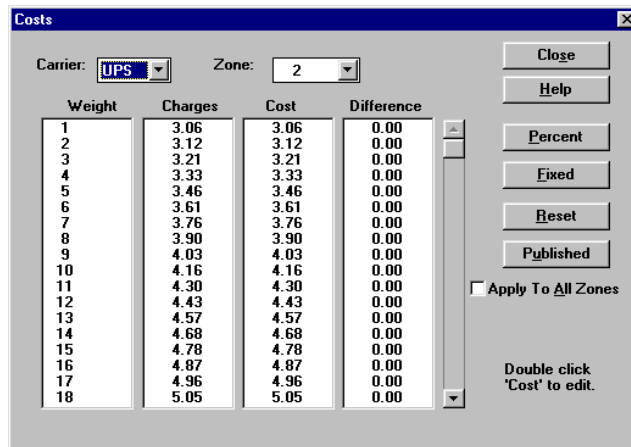
1. Launch the CPS Tools program by opening Start→Programs→CPS for Windows→Tools
2. Select File→Rebuild→All:



3. Click OK to the confirmation message:



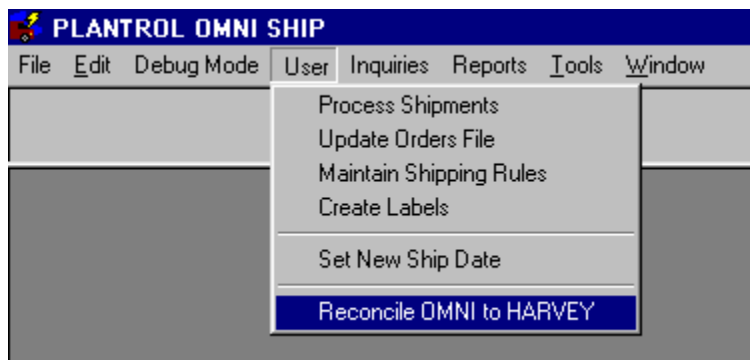
**NOTE:** If you check your new rates (Edit→Costs in CPS Tools), you will notice the 1.25% increase:

A window titled "Costs" with a blue header bar. It features a "Carrier" dropdown menu set to "UPS" and a "Zone" dropdown menu set to "2". Below these are several buttons: "Close", "Help", "Percent", "Fixed", "Reset", and "Published". There is also a checkbox labeled "Apply To All Zones" and a note that says "Double click 'Cost' to edit." The main area contains a table with four columns: "Weight", "Charges", "Cost", and "Difference".

Weight	Charges	Cost	Difference
1	3.06	3.06	0.00
2	3.12	3.12	0.00
3	3.21	3.21	0.00
4	3.33	3.33	0.00
5	3.46	3.46	0.00
6	3.61	3.61	0.00
7	3.76	3.76	0.00
8	3.90	3.90	0.00
9	4.03	4.03	0.00
10	4.16	4.16	0.00
11	4.30	4.30	0.00
12	4.43	4.43	0.00
13	4.57	4.57	0.00
14	4.68	4.68	0.00
15	4.78	4.78	0.00
16	4.87	4.87	0.00
17	4.96	4.96	0.00
18	5.05	5.05	0.00

## 6. Reconcile and Update

When you reconcile as part of your normal end-of day processes, make sure the fuel surcharges are added to your UPH shipments:



The reconcile window displays:

Reconcile Harvey / Omni Ship

Shipment Number	Harvey Carrier	Omni Carrier	Harvey Charges	Omni Charges	Updated
00106776-001	UPH	UPS	24.75	49.74	<input type="checkbox"/>
00106776-002	UPH	UPS	24.75	49.74	<input type="checkbox"/>
00106776-003	UPH	UPS	24.75	49.74	<input type="checkbox"/>

PRINT PREVIEW CANCEL UPDATE

Update button

When you click the Update button, the Harvey Charges number reflects the 1.25% increase. The updated field displays a checkmark to indicate that the Omni Ship records were updated.

Reconcile Harvey / Omni Ship

Shipment Number	Harvey Carrier	Omni Carrier	Harvey Charges	Omni Charges	Updated
00106776-001	UPH	UPS	25.06	49.74	<input checked="" type="checkbox"/>
00106776-002	UPH	UPS	25.06	49.74	<input checked="" type="checkbox"/>
00106776-003	UPH	UPS	25.06	49.74	<input checked="" type="checkbox"/>

PRINT PREVIEW QUIT



## FREQUENTLY ASKED QUESTIONS

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1. **What does it mean if I get the message “service was left blank – Harvey can’t ship”?**

Something in the data is causing CPS to not get a valid service level. Check to see if you’re trying to ship a UPS letter via ground. The letters must ship via air.

2. **What are those numbers I see at the bottom of the Harvey daily entry screen?**

These numbers are an accumulation of the packages you have shipped through CPS. This counter can be reset at any time by clicking on the “Zero” button (F 9) on the CPS tool bar.

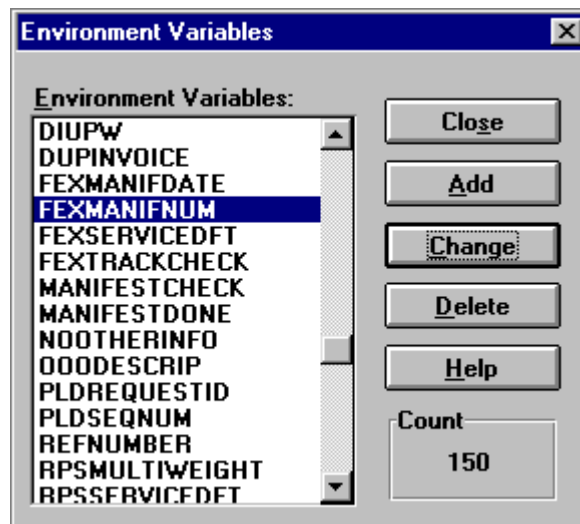
3. **What does it mean when I see a message when processing that “An Accessorial that is not available has been used”?**

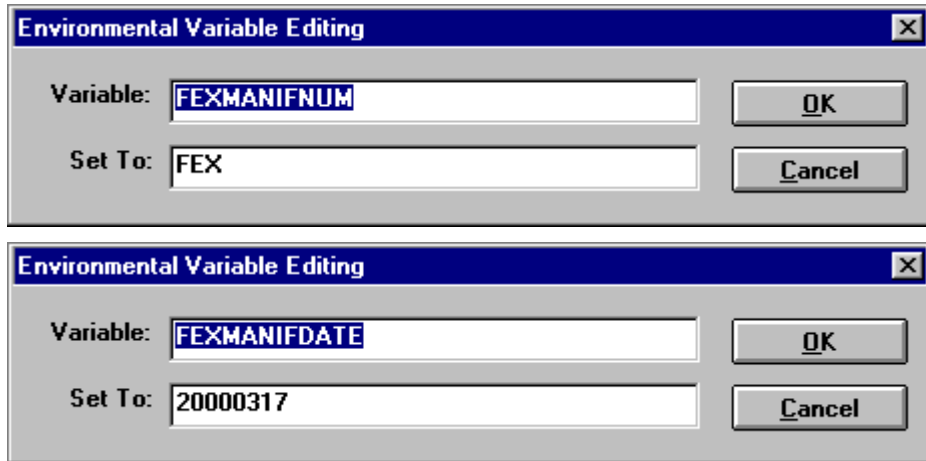
A shipment or package option was selected from the Items tab that is not available for the carrier and service level combination you chose.

4. **Why don’t my FedEx or US Postal shipments move out of the CPS Daily File?**

If you are not running daily manifests for these carriers, CPS environment variables may need to be set. Go to Start – Programs – CPS for Windows – Tools – Setup – Environmental Variables. (Example shown is for FedEx.) If it does not already exist (not visible in the list) press ADD to add FEXMANIFNUM, and set the value to FEX. Also add FEXMANIFDATE and set the value to the current date, in the format shown.

For U.S. Postal, change the “FEX” to “USP” in the example above.





**5. How do I rebuild the CPS index files?**

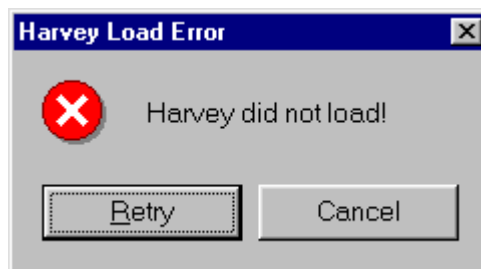
First, close Omni and CPS on all workstations. Then, on the master PC, select Start – Programs – CPS for Windows – Tools. Click the “file” menu and select “rebuild” “all”.

**6. I deleted the sequential numbering from the form I was shipping, but the package labels still printed with numbers. Why?**

The package info, including numbering ranges, is created when you enter the package info in the package grid. If you change the numbering after this is already done, the numbering will not get changed in the package records, which is where the label info comes from. Change or delete the starting number in the item grid BEFORE you enter the package information.

If you forget, and have already entered the package info, you can use the REMOVE FROM SHIPMENT button to remove the job info from the shipment, and ADD the ORDER again to start over.

**7. Why do I sometimes see the “Harvey did not load” message? What should I do?**



Because of variations in processor speeds, the Omni component may load before the Harvey program. In this case, you will see this message. Always click RETRY, more than once if needed. The system should come up normally.

**6. Why did I get the error STAGING FAILED when I uploaded and what should I do?**

This message indicates that there is a problem in the data in the file.

Frequently it is caused by an international shipment that has been entered incorrectly. The file will need to be sent to Harvey support and they may need to edit it. Complete your end of day processes and contact Plantrol

**7. Why do I sometimes get a message that there is not enough memory, and how should I deal with it?**

The program that transmits data to UPS uses quite a bit of memory and doesn't release it all back when it closes – so each time it's launched it uses up somewhat more. We recommend rebooting daily to release the memory.

**8. My upload failed. What should I do?**

If the correct summary barcode label was printed (indicating the PLD file was created), but the upload failed, you can proceed with all other end of day steps, including moving to history. The next time you open Omni, you will be warned that there is a file that needs to be uploaded and prompted to begin the upload. Modem problems, a bad connection or telephone line, or temporary problems at the UPS center probably caused the problem.

You can also start the upload of the prior day's file with Omni closed by selecting START – Programs – CPS for Windows – Upload Previous Day. More info can be found in section 5.2 of the User Manual "How to deal with errors uploading the manifest to UPS."

If the system failed before it created the upload file and no summary barcode label was printed, contact Plantrol support before moving to history or completing any other end of day steps and we will involve Harvey support if needed.

**9. UPS has requested a past day's upload file, but I am unable to upload it successfully. What should I do?**

You can provide UPS with a paper report. If you have the day's shipping detail report, a copy of that can be given to UPS. If this is not available, in UBL, go to the SH system. On the report menu, run the UPS Manifest. You will be prompted for the UPS pickup record number and the date shipped.